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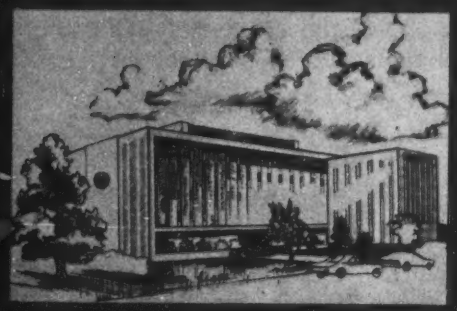


TEXAS LABOR MARKET REVIEW

T.E.C. BUILDING | OCTOBER 1979 | AUSTIN, TEXAS 78778

STATEWIDE EMPLOYMENT UP SHARPLY

Total employment in Texas increased by over 88,000 from mid-August to mid-September and much of the increase was due to the return of school employees for the fall term. This huge increase in employment led to a rise of just over 50,000 in the State's labor force during the month.

The beginning of the new school term also contributed to a sizeable decline in total unemployment. As the school year began, thousands who had been seasonal jobseekers were returned to work with educational institutions or dropped out of the labor force to return to school. Thus the end of summer signaled the end of a large supply of students and others who had been seeking summer employment. The end of summer also brought to a close the seasonal employment of others who had found work and, although employment in schools and colleges rose in September, many industries experienced declines as summer workers left.

The net result from all this movement, which occurs this time each year, was a significant upswing in employment accompanied by a notable drop in unemployment and a drop of six-tenths of a percent in the actual unemployment rate for the State. The unemployment rate for September was 4.0 percent, compared to 4.6 percent a month ago and 4.8 percent a year ago. The September rate of 4.0 percent was the lowest recorded for the month since 1973, when a rate of 3.8 was posted. The National unemployment rate declined from 5.9 percent for August to 5.6 percent for September. The seasonally adjusted unemployment rate during September was 3.9 percent for Texas and 5.8 percent for the United States.

Among the major labor market areas within the State, all realized some degree of reduction in total unemployment and an accompanying drop in their unemployment rates over the month. Not all of the areas, however, showed increases in employment. Three of the areas actually experienced small declines in their employment, although these decreases did not prevent their unemployment rates from dropping. Twenty of the 25 major labor market areas had unemployment rates of less than 6.0 percent for September.

WAGE AND SALARY EMPLOYMENT UP

A rather large increase in government led to a substantial rise in total nonagricultural wage and salary employment. The advance in government was attributed to the return of workers in education following

SUMMARY OF LABOR FORCE† ESTIMATES

	TOTAL EMPLOYMENT‡			TOTAL UNEMPLOYMENT			UNEMPLOYED AS % OF LABOR FORCE		
	SEP* 1979	AUG** 1979	SEP** 1978	SEP* 1979	AUG** 1979	SEP** 1978	SEP* 1979	AUG** 1979	SEP** 1978
STATEWIDE	5,983,600	5,895,200	5,640,900	247,000	285,200	284,200	4.0	4.6	4.8
ABILENE	65,360	64,040	60,830	1,910	1,970	2,190	2.8	3.0	3.5
AMARILLO	85,680	84,150	80,830	2,680	3,280	3,120	3.0	3.8	3.7
AUSTIN	240,700	237,150	223,300	7,050	8,100	8,050	2.8	3.3	3.5
BEAUMONT-PORT ARTHUR-ORANGE	156,600	152,200	151,800	8,400	10,250	10,550	5.1	6.3	6.5
BROWNSVILLE-HARLINGEN-SAN BENITO	63,690	63,210	61,910	5,720	6,610	6,910	8.2	9.5	10.0
BRYAN-COLLEGE STATION	36,350	34,960	33,770	840	1,030	1,140	2.3	2.9	3.3
CORPUS CHRISTI	124,650	125,600	121,600	6,500	7,500	7,500	5.0	5.6	5.8
DALLAS-FORT WORTH	1,448,000	1,417,600	1,326,400	50,300	59,400	55,700	3.4	4.0	4.0
EL PASO	158,050	157,250	150,250	12,600	14,400	15,700	7.4	8.4	9.5
GALVESTON-TEXAS CITY	78,650	77,910	76,860	3,970	4,470	4,860	4.8	5.4	5.9
HOUSTON	1,362,100	1,346,900	1,277,500	43,900	49,300	53,400	3.1	3.5	4.0
KILLEEN-TEMPLE	61,040	60,070	58,350	3,060	3,420	3,150	4.8	5.4	5.1
LAREDO	28,120	28,480	25,770	2,880	3,450	3,580	9.3	10.8	12.2
LONGVIEW-MARSHALL	61,860	60,820	58,900	3,430	3,980	3,080	5.3	6.1	5.0
LUBBOCK	101,140	98,220	96,970	3,360	3,790	3,540	3.2	3.7	3.5
MCALLEN-PHARR-EDINBURG	74,600	73,580	69,870	10,940	11,160	12,420	12.8	13.2	15.1
MIDLAND	44,980	44,830	42,150	1,460	1,540	1,970	3.1	3.3	4.5
ODESSA	59,810	59,350	55,540	1,980	2,330	2,190	3.2	3.8	3.8
SAN ANGELO	41,830	41,110	38,950	1,270	1,380	1,460	2.9	3.2	3.6
SAN ANTONIO	388,350	383,450	373,700	22,700	26,350	26,150	5.5	6.4	6.5
SHERMAN-DENISON	38,210	38,270	35,900	1,650	1,970	1,990	4.1	4.9	5.3
TEXARKANA	45,560	46,110	43,050	3,570	3,920	3,400	7.3	7.8	7.3
TYLER	61,780	60,640	58,580	2,490	2,890	2,750	3.9	4.5	4.5
WACO	76,270	74,190	71,430	2,900	3,660	3,380	3.7	4.7	4.5
WICHITA FALLS	58,590	57,480	55,970	1,800	1,920	2,280	3.0	3.2	3.9

†Sum of estimated number of total employed and unemployed workers residing in the specified areas.

‡Includes resident wage and salary workers, self-employed, unpaid family workers and domestics in private households, agricultural workers and workers involved in labor-management disputes.

*Preliminary—subject to revision. **Revised.

TEXAS LABOR MARKET REVIEW
Official Publication of
TEXAS EMPLOYMENT COMMISSION
NOLAN F. WARD ..... Chairman
KEN CLAPP ..... Commissioner
A.C. SHIRLEY ..... Commissioner
ERNIE W. TULLIS, Administrator

Published Monthly at the TEC Building, Austin, Texas
Economic Research and Analysis Department

the summer break. State and local government were both up significantly due to the start of the new school year as teachers, food service and maintenance workers, and administrative personnel returned to their regular jobs.

Manufacturing employment in the State rose slightly as the durable goods sector recorded a moderate advance due to an upturn in transportation equipment. This industry showed sizeable gains as workers returned following a partial shutdown for retooling in the automotive manufacturing segment. The aircraft and parts portion of transportation equipment continued its upward trend in employment. Settlements of labor-management disputes paved the way for gains in fabricated metal products and electric and electronic equipment. The oilfield machinery segment of nonelectrical machinery recorded a slight decline as many seasonal employees left to return to school.

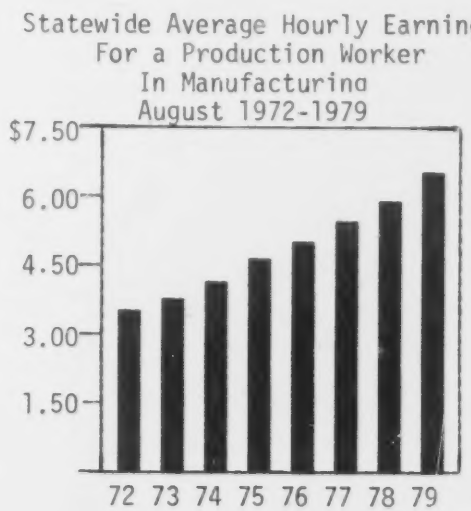
The nondurable goods sector suffered a small downturn as apparel and other finished textile, products and printing and publishing posted moderate losses. All segments of apparel and other finished textile products decreased as a decline in business activity was reported. Printing and publishing also reported widespread declines, but the largest drop was a seasonal cutback among firms that publish high school and college yearbooks.

The increase in nonmanufacturing was due to the upswing in government employment as the trade sector was the only other segment to post a significant increase. Retail trade showed increased activity as food stores, eating and drinking places, furniture stores, and book stores experienced gains. The services sector managed a slight gain solely on the strength of a considerable gain in educational services. The opening of the new school year led to the gain in this segment. Losses due to seasonal factors were evident in hotels and other lodging places and amusement, including motion pictures.

The beginning of school led to losses in mining and construction as summer workers left to return to the classroom. Some small builders and developers were affected by rising interest rates, but generally demand remained high in construction. The majority of industries in transportation and public utilities recorded a drop in employment. Water transportation was down moderately as was railroad transportation. A labor-management dispute led to the decline in railroad transportation. All portions of finance, insurance, and real estate suffered reductions over the month. The beginning of school usually deals a setback to real estate activity as families with school-age children become hesitant to relocate during a school term.

SHIFTS NOTED IN HOURS AND EARNINGS

Average weekly hours worked and average hourly earnings were up for production workers in Texas from August to September. Some significant changes were noted among the individual industry hours and earnings totals. Increased overtime led to gains in both hours and earnings in fabricated metal products, other nondurable goods and primary metal industries. Banking also managed increases in both hours and earnings. These gains were attributed to the release of many summer workers who were on the lower end of the pay scale. Transportation equipment posted a decrease of 0.9 hours and a gain of 28 cents in average hourly earnings as the industry returned to a normal state following a retooling operation in the automotive sector. Printing and publishing and electric, gas and sanitary services also experienced reductions in hours, but rather sizeable rises in hourly earnings as seasonal cutbacks and reduced hiring were experienced. At the other extreme, malt beverages showed an advance of 0.3 hours, but a decline of 39 cents in hourly earnings due to a drop in consumer demand. Less overtime contributed to a similar situation, increased hours and reduced earnings, in petroleum and coal refining.



DROP NOTED AMONG INSURED UNEMPLOYED

A reduction of 12.3 percent in statewide insured unemployment under the regular program was recorded from August to September. Insured unemployment totaled 54,562 in August and only 47,844 in September. The decline in insured unemployment was in line with the 13.4 percent decrease noted in total unemployment over the same period. The insured unemployment rate for Texas was 1.1 percent in September, compared to 1.2 percent for August and September 1978. The National insured unemployment rate was 2.4 percent for September, 2.7 percent for August, and 2.6 percent for a year ago.

HOURS AND EARNINGS IN TEXAS*

SOURCE: TEXAS EMPLOYMENT COMMISSION IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS, U.S. DEPARTMENT OF LABOR

	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	SEP† 1979	AUG 1979	SEP 1978	SEP† 1979	AUG 1979	SEP 1978	SEP† 1979	AUG 1979	SEP 1978
FOR TEXAS									
MANUFACTURING—TOTAL	$270.27	$265.27	$248.53	41.2	41.0	41.7	$6.56	$6.47	$5.96
DURABLE GOODS	273.55	266.43	245.44	41.7	41.5	41.6	6.56	6.42	5.90
LUMBER & WOOD PRODUCTS	221.95	220.51	185.78	42.6	42.9	40.3	5.21	5.14	4.61
FURNITURE & FIXTURES	186.97	187.67	170.96	39.7	40.1	39.3	4.76	4.68	4.35
STONE, CLAY & GLASS PRODS.	267.79	267.89	233.92	43.9	45.1	42.3	6.10	5.94	5.53
PRIMARY METAL INDUSTRIES	359.97	344.44	313.18	42.2	41.3	41.1	8.53	8.34	7.62
FABRICATED METAL PRODUCTS	280.97	265.79	256.68	42.7	41.4	42.6	6.58	6.42	6.03
MACHINERY, EXCEPT ELEC.	276.71	273.41	260.47	41.3	41.3	42.7	6.70	6.62	6.10
OIL FIELD MACHINERY	322.66	321.43	308.77	42.4	42.8	44.3	7.61	7.51	6.97
ELEC. & ELECTRONIC EQUIP.	241.98	233.63	221.96	40.6	39.8	41.8	5.96	5.87	5.31
TRANSPORTATION EQUIPMENT	328.82	324.31	280.19	41.0	41.9	40.2	8.02	7.74	6.97
AIRCRAFT & PARTS	351.53	352.56	328.80	41.7	43.1	42.1	8.43	8.18	7.81
INSTR. & RELATED PRODUCTS	212.91	209.16	189.74	40.4	40.3	40.2	5.27	5.19	4.72
MISC. MFG. INDUSTRIES	193.19	181.42	181.25	40.5	38.6	40.1	4.77	4.70	4.52
NONDURABLE GOODS	266.09	262.91	252.89	40.5	40.2	41.8	6.57	6.54	6.05
FOOD & KINDRED PRODUCTS	244.67	247.39	236.10	43.0	43.1	44.8	5.69	5.74	5.27
MEAT PRODUCTS	244.65	257.66	249.15	42.4	44.5	45.8	5.77	5.79	5.44
MALT BEVERAGES	461.91	475.66	426.86	43.7	43.4	42.9	10.57	10.96	9.95
TEXTILE MILL PRODUCTS	199.91	193.70	173.86	42.9	41.3	41.2	4.66	4.69	4.22
APPRL. & OTHER TEXT. PROD.	141.99	139.81	132.38	36.5	36.6	37.5	3.89	3.82	3.53
PAPER & ALLIED PRODUCTS	294.28	288.97	274.99	42.1	41.4	42.9	6.99	6.98	6.41
PRINTING & PUBLISHING	244.45	238.79	225.22	39.3	39.5	39.1	6.22	6.03	5.76
CHEMICALS & ALLIED PRODS.	418.91	420.33	387.13	42.4	42.5	43.4	9.88	9.89	8.92
PETROLEUM & COAL PRODUCTS	384.87	382.01	404.80	39.8	39.1	44.0	9.67	9.77	9.20
PETROLEUM REFINING	393.39	389.38	417.77	39.3	38.4	43.7	10.01	10.14	9.56
LEATHER & LEATHER PRODUCTS	146.67	146.30	122.06	37.9	38.5	35.9	3.87	3.80	3.40
OTHER NONDURABLE GOODS	241.19	217.70	223.69	41.8	38.6	43.1	5.77	5.64	5.19
NONMANUFACTURING									
MINING	345.58	340.18	318.09	46.2	45.6	46.1	7.48	7.46	6.90
OIL & GAS EXTRACTION	348.18	342.00	321.54	46.3	45.6	46.0	7.52	7.50	6.99
OTHER MINING & QUARRYING**	310.93	301.21	INA	46.2	45.5	INA	6.73	6.62	INA
COMMUNICATIONS, EXCEPT U.S. POSTAL SERV.	327.06	329.43	305.34	41.4	41.7	41.6	7.90	7.90	7.34
ELEC., GAS & SAN. SVCS.	312.64	310.17	286.06	41.3	42.2	41.7	7.57	7.35	6.96
WHOLESALE & RETAIL TRADE	185.33	185.60	174.24	35.3	35.9	35.2	5.25	5.17	4.95
WHOLESALE TRADE	271.20	268.11	252.28	40.0	40.5	40.3	6.78	6.62	6.26
RETAIL TRADE	150.30	151.64	142.33	33.4	34.0	33.1	4.50	4.46	4.30
GENERAL MDSE. STORES	121.54	125.74	110.33	29.5	31.2	29.5	4.12	4.03	3.74
BANKING	170.38	165.88	154.38	37.2	37.7	37.2	4.58	4.40	4.15
FOR THE MAJOR MARKETS									
AMARILLO									
MANUFACTURING	272.00	268.84	245.10	43.8	44.0	43.0	6.21	6.11	5.70
DURABLE GOODS	286.03	283.05	261.46	42.5	42.5	41.9	6.73	6.66	6.24
NONDURABLE GOODS	259.52	256.96	234.67	44.9	45.4	43.7	5.78	5.66	5.37
AUSTIN									
MANUFACTURING	203.91	201.55	190.49	40.7	40.8	41.5	5.01	4.94	4.59
DURABLE GOODS	206.55	202.86	196.19	40.9	40.9	42.1	5.05	4.96	4.66
NONDURABLE GOODS	192.55	196.83	176.80	39.7	40.5	40.0	4.85	4.86	4.42
BEAUMONT									
MANUFACTURING	366.87	371.96	349.79	40.9	41.1	41.2	8.97	9.05	8.49
DURABLE GOODS	324.16	328.80	286.82	41.4	42.1	40.8	7.83	7.81	7.03
NONDURABLE GOODS	388.95	395.04	379.22	40.6	40.6	41.4	9.58	9.73	9.16
CORPUS CHRISTI									
MANUFACTURING	305.86	304.61	292.83	41.0	41.5	43.0	7.46	7.34	6.81
DURABLE GOODS	238.29	242.35	218.14	39.0	38.9	40.1	6.11	6.23	5.44
NONDURABLE GOODS	341.46	337.19	332.72	42.0	42.9	44.6	8.13	7.86	7.46
DALLAS/FT. WORTH									
MANUFACTURING	250.51	246.22	228.78	40.8	40.9	41.0	6.14	6.02	5.58
DURABLE GOODS	266.24	260.21	241.78	41.6	41.7	41.4	6.40	6.24	5.84
NONDURABLE GOODS	219.69	217.95	204.72	39.3	39.2	40.3	5.59	5.56	5.08
EL PASO									
MANUFACTURING	209.30	197.11	185.77	40.8	39.9	41.1	5.13	4.94	4.52
DURABLE GOODS	254.52	249.71	246.79	40.4	39.7	41.2	6.30	6.29	5.99
NONDURABLE GOODS	195.91	181.55	167.28	40.9	39.9	41.0	4.79	4.55	4.08
GALVESTON									
MANUFACTURING	411.20	407.77	408.58	42.7	42.3	44.8	9.63	9.64	9.12
DURABLE GOODS	363.72	343.21	335.18	43.3	41.5	43.7	8.40	8.27	7.67
NONDURABLE GOODS	435.87	441.95	442.65	42.4	42.7	45.4	10.28	10.35	9.75
HOUSTON									
MANUFACTURING	334.70	334.19	317.36	42.8	42.9	44.2	7.82	7.79	7.18
DURABLE GOODS	316.09	314.79	301.44	43.3	43.3	44.2	7.30	7.27	6.82
NONDURABLE GOODS	365.40	365.87	342.22	42.0	42.2	44.1	8.70	8.67	7.76
LUBBOCK									
MANUFACTURING	198.80	197.38	182.78	40.0	40.2	40.8	4.97	4.91	4.48
DURABLE GOODS	190.22	188.28	174.47	38.9	38.9	40.2	4.89	4.84	4.34
NONDURABLE GOODS	221.79	222.43	204.37	42.9	43.7	42.4	5.17	5.09	4.82
SAN ANTONIO									
MANUFACTURING	198.62	195.84	178.48	40.7	40.8	39.4	4.88	4.80	4.53
DURABLE GOODS	206.59	201.54	175.72	41.4	41.3	39.4	4.99	4.88	4.46
NONDURABLE GOODS	190.80	191.09	181.70	40.0	40.4	39.5	4.77	4.73	4.60
WACO									
MANUFACTURING	236.64	227.29	210.08	40.8	40.3	40.4	5.80	5.64	5.20
DURABLE GOODS	246.29	237.72	215.17	42.1	41.2	41.3	5.85	5.77	5.21
NONDURABLE GOODS	225.98	215.36	205.01	39.3	39.3	39.5	5.75	5.48	5.19
WICHITA FALLS									
MANUFACTURING	242.53	245.62	209.97	39.5	40.8	39.1	6.14	6.02	5.37
DURABLE GOODS	259.50	264.80	226.57	39.8	41.7	40.1	6.52	6.35	5.65
NONDURABLE GOODS	188.44	187.34	165.35	38.3	38.0	36.5	4.92	4.93	4.53

*Figures cover Production Workers in Manufacturing and Mining industries only and Nonsupervisory Employees in other industry divisions. Earnings' averages include premium pay for overtime, holidays and for late-shift work. †Preliminary—subject to revisions upon receipt of additonal reports. **Data for prior year not comparable to current series.

NONAGRICULTURAL WAGE AND SALARY† ESTIMATES—TEXAS

INDUSTRY	SEP* 1979	AUG** 1979	SEP** 1978	CHANGE FROM AUG 1979	CHANGE FROM SEP 1978
‡TOTAL NONAGRICULTURAL EMPLOYMENT	5,556,700	5,508,700	5,315,300	48,000	241,400
MANUFACTURING	1,000,500	997,900	966,100	2,600	34,400
DURABLE GOODS	579,500	575,400	553,300	4,100	26,200
LUMBER & WOOD PRODUCTS	39,800	39,600	39,300	200	500
LOGGING CAMPS, SAWMILLS, PLANING MILLS	9,300	9,200	8,900	100	400
FURNITURE & FIXTURES	16,100	16,100	18,400	0	−2,300
STONE, CLAY & GLASS PRODUCTS	44,600	44,700	43,000	− 100	1,600
CONCRETE, GYPSUM & PLASTER PRODUCTS	18,600	18,800	17,600	− 200	1,000
PRIMARY METAL INDUSTRIES	44,200	44,300	43,400	− 100	800
FABRICATED METAL PRODUCTS	87,800	87,400	87,200	400	600
FABRICATED STRUCTURAL METAL PRODUCTS	45,100	44,500	45,400	600	− 300
MACHINERY, EXCEPT ELECTRICAL	139,400	139,400	134,800	0	4,600
OIL FIELD MACHINERY	55,400	55,700	52,800	− 300	2,600
ELECTRIC & ELECTRONIC EQUIPMENT	101,400	101,200	88,700	200	12,700
TRANSPORTATION EQUIPMENT	76,100	72,900	69,500	3,200	6,600
AIRCRAFT & PARTS	44,800	44,500	39,200	300	5,600
INSTRUMENTS & RELATED PRODUCTS	17,900	17,800	17,300	100	600
MISCELLANEOUS MANUFACTURING INDUSTRIES	12,200	12,000	11,700	200	500
NONDURABLE GOODS	421,000	422,500	412,800	−1,500	8,200
FOOD & KINDRED PRODUCTS	97,700	97,500	97,300	200	400
MEAT PRODUCTS	26,300	26,100	25,500	200	800
DAIRY PRODUCTS	5,400	5,400	5,300	0	100
BAKERY PRODUCTS	10,400	10,400	10,700	0	− 300
MALT BEVERAGES	3,500	3,500	3,400	0	100
TEXTILE MILL PRODUCTS	6,000	6,100	6,400	− 100	− 400
APPAREL & OTHER FINISHED TEXTILE PRODUCTS	71,300	72,000	72,900	− 700	−1,600
PAPER & ALLIED PRODUCTS	21,800	21,900	21,500	− 100	300
PRINTING & PUBLISHING	58,600	59,200	55,500	− 600	3,100
NEWSPAPER, PERIODICALS, BOOKS & MISC. PUBL.	31,600	32,300	29,500	− 700	2,100
CHEMICALS & ALLIED PRODUCTS	80,400	80,600	78,800	− 200	1,600
PETROLEUM & COAL PRODUCTS	43,400	43,400	42,700	0	700
PETROLEUM REFINING	39,900	39,900	39,300	0	600
LEATHER & LEATHER PRODUCTS	7,800	7,700	8,000	100	− 200
OTHER NONDURABLE GOODS	34,000	34,100	29,700	− 100	4,300
TOTAL NONMANUFACTURING	4,556,200	4,510,800	4,349,200	45,400	207,000
MINING	198,200	199,600	185,000	−1,400	13,200
OIL & GAS EXTRACTION	189,400	190,600	176,600	−1,200	12,800
OTHER MINING & QUARRYING	8,800	9,000	8,400	− 200	400
CONSTRUCTION	406,900	413,800	388,100	−6,900	18,800
TRANSPORTATION & PUBLIC UTILITIES	357,700	359,100	337,000	−1,400	20,700
RAILROAD TRANSPORTATION	31,700	32,100	31,000	− 400	700
TRANSPORTATION, EXCEPT RAILROADS	177,200	178,200	168,100	−1,000	9,100
TRANSPORTATION BY AIR	33,600	33,800	30,300	− 200	3,300
COMMUNICATION	82,100	81,700	76,000	400	6,100
ELECTRIC, GAS & SANITARY SERVICES	66,700	67,100	61,900	− 400	4,800
ELECTRIC SERVICES	35,700	35,900	32,400	− 200	3,300
GAS PRODUCTION & DISTRIBUTION	26,900	27,100	25,800	− 200	1,100
WHOLESALE & RETAIL TRADE	1,342,100	1,336,700	1,293,000	5,400	49,100
WHOLESALE TRADE	388,800	388,100	375,800	700	13,000
RETAIL TRADE	953,300	948,600	917,200	4,700	36,100
BUILDING MATERIALS & GARDEN SUPPLIES	44,100	44,200	42,400	− 100	1,700
GENERAL MERCHANDISE STORES	133,900	133,400	132,300	500	1,600
FOOD STORES	157,500	155,300	147,700	2,200	9,800
AUTOMOTIVE DEALERS & SERVICE STATIONS	123,500	123,700	126,200	− 200	−2,700
APPAREL & ACCESSORY STORES	70,400	70,500	67,500	− 100	2,900
OTHER RETAIL TRADE	423,900	421,500	401,100	2,400	22,800
FINANCE, INSURANCE & REAL ESTATE	313,500	314,800	299,400	−1,300	14,100
BANKING	83,500	83,900	77,800	− 400	5,700
INSURANCE CARRIERS, AGENTS & BROKERS	107,000	107,500	105,300	− 500	1,700
OTHER FINANCE, INSURANCE & REAL ESTATE	123,000	123,400	116,300	− 400	6,700
SERVICES	938,600	938,300	901,800	300	36,800
HOTELS & OTHER LODGING PLACES	54,900	56,500	55,000	−1,600	− 100
PERSONAL SERVICES	66,000	66,100	62,600	− 100	3,400
BUSINESS & REPAIR SERVICES	234,000	236,700	220,800	−2,700	13,200
AMUSEMENT, INCLUDING MOTION PICTURES	41,100	42,400	40,300	−1,300	800
HEALTH SERVICES	248,900	249,300	245,900	− 400	3,000
EDUCATIONAL SERVICES	50,300	43,600	48,000	6,700	2,300
OTHER SERVICES & MISCELLANEOUS	243,400	243,700	229,200	− 300	14,200
TOTAL GOVERNMENT	999,200	948,500	944,900	50,700	54,300
TOTAL FEDERAL GOVERNMENT	160,400	160,900	160,900	− 500	− 500
TOTAL STATE GOVERNMENT	204,600	196,400	201,400	8,200	3,200
TOTAL LOCAL GOVERNMENT	634,200	591,200	582,600	43,000	51,600
TOTAL MANUFACTURING PRODUCTION WORKERS	686,100	683,900	669,500	2,200	16,600
DURABLE GOODS	392,300	388,800	379,400	3,500	12,900
NONDURABLE GOODS	293,800	295,100	290,100	−1,300	3,700

†Estimated number of nonagricultural jobs in Texas without reference to place of residence of workers. ‡Estimates of TEC in cooperation with Bureau of Labor Statistics and Employment and Training Administration, U.S. Department of Labor. *Preliminary—subject to revision. **Revised.

FARM EMPLOYMENT DECREASES

A drop from 200,100 at mid-August to 190,000 at mid-September was recorded in total agricultural employment in Texas. Seasonal employment was 61,800 at mid-September, compared to 68,500 for the same period a year ago. The cotton harvest was underway in Central Texas as seasonal employment in cotton activities was 8,400, below the year-ago total of 8,800. Seasonal employment in vegetable activities slid from 9,950 last year to 9,100 for the same period this year. Feed and grain activities occupied 27,150 seasonal workers compared to 30,350 last year as over two-thirds of the grain sorghum crop has already been harvested. Pastures were in good shape across most of Texas and livestock were reported to be in good condition.

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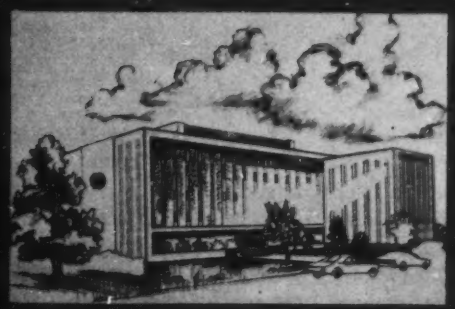

TEXAS LABOR MARKET REVIEW

T.E.C. BUILDING | NOVEMBER 1979 | AUSTIN, TEXAS 78778

EMPLOYMENT GAINS CONTINUE

Statewide total employment rose past the six-million mark for the first time as an increase of 44,800 was recorded from mid-September to mid-October. During the same period, total unemployment in Texas reached its lowest level since March of this year.

Continued hiring by state and local educational institutions contributed greatly to the upswing in employment, but gains were not restricted to education. Other segments of the State's labor force showed improvement as well. Many industries which suffered small declines a month ago as summer employees left, reversed that trend and posted advances of various magnitudes. Several factors appear to have influenced the rise in employment. Chief among these factors are an abundant supply of workers, favorable weather conditions, and high demand for products, a factor which should have even more impact as the holiday season approaches.

The actual unemployment rate for the State dropped from 4.0 percent in September to 3.8 percent for October. The year-ago rate was 4.3 percent for Texas. The National unemployment rate did not change from the month-ago rate of 5.6 percent. The seasonally adjusted unemployment rate was 4.1 percent for Texas and 6.0 percent for the United States.

Almost every major labor market area in the State experienced increased employment as well as declining unemployment. Small drops in employment were noted in only two areas; however, both of these areas also experienced decreases in unemployment and managed to show unemployment rates below those of a month ago. Only one area realized an increase in its unemployment rate. Twenty of the 25 major labor market areas had rates of less than 6.0 percent and ten had rates of 3.0 percent or less.

INCREASES SEEN IN WAGE AND SALARY

Nonagricultural wage and salary employment reached a new high during October as almost every major segment showed improvement. Government employment underwent the most dramatic increase as state and local educational institutions continued hiring, although the net increase was not as large as that realized last month. Overall, Government accounted for about half of the advance among the nonmanufacturing sectors.

Manufacturing was responsible for over 17 percent of the total gain in nonagricultural wage and salary employment. The gains within manufacturing were evenly split between the durable and nondurable goods sectors. The largest single gain in all of man-

SUMMARY OF LABOR FORCE† ESTIMATES

	TOTAL EMPLOYMENT‡			TOTAL UNEMPLOYMENT			UNEMPLOYED AS % OF LABOR FORCE		
	OCT* 1979	SEP** 1979	OCT** 1978	OCT* 1979	SEP** 1979	OCT** 1978	OCT* 1979	SEP** 1979	OCT** 1978
STATEWIDE	6,028,400	5,983,600	5,807,600	235,500	247,000	259,900	3.8	4.0	4.3
ABILENE	65,570	65,340	62,380	1,750	1,910	1,900	2.6	2.8	3.0
AMARILLO	86,200	85,460	83,430	2,610	2,680	2,890	2.9	3.0	3.3
AUSTIN	244,500	240,050	231,800	7,000	7,050	7,350	2.8	2.9	3.1
BEAUMONT-PORT ARTHUR-ORANGE	156,550	157,050	157,100	7,650	8,400	9,950	4.7	5.1	6.0
BROWNSVILLE-HARLINGEN-SAN BENITO	64,030	63,670	64,200	5,600	5,740	6,630	8.0	8.3	9.4
BRYAN-COLLEGE STATION	38,140	36,340	36,370	870	840	1,030	2.2	2.3	2.8
CORPUS CHRISTI	126,000	124,950	125,100	6,100	6,500	6,450	4.6	4.9	4.9
DALLAS-FORT WORTH	1,458,800	1,447,200	1,368,100	46,200	50,400	50,000	3.1	3.4	3.5
EL PASO	159,750	158,550	154,400	12,100	12,700	14,200	7.0	7.4	8.4
GALVESTON-TEXAS CITY	78,900	78,540	78,570	3,480	3,980	4,610	4.2	4.8	5.5
HOUSTON	1,374,400	1,362,400	1,318,500	43,200	43,900	48,200	3.0	3.1	3.5
KILLEEN-TEMPLE	60,680	60,990	59,850	2,990	3,060	2,980	4.7	4.8	4.7
LAREDO	28,400	28,110	26,420	2,850	2,880	3,390	9.1	9.3	11.4
LONGVIEW—MARSHALL	62,290	61,850	60,620	3,100	3,420	3,040	4.7	5.2	4.8
LUBBOCK	101,080	99,990	100,070	3,150	3,340	3,070	3.0	3.2	3.0
MCALLEN-PHARR-EDINBURG	78,120	74,580	75,510	10,510	10,970	11,340	11.9	12.8	13.1
MIDLAND	45,330	45,050	43,560	1,150	1,470	1,590	2.5	3.2	3.5
ODESSA	60,640	59,800	57,200	1,730	1,970	2,140	2.8	3.2	3.6
SAN ANGELO	42,050	41,820	39,980	1,120	1,260	1,280	2.6	2.9	3.1
SAN ANTONIO	393,600	390,200	383,100	21,200	22,600	23,950	5.1	5.5	5.9
SHERMAN-DENISON	38,520	38,370	36,590	1,660	1,660	1,970	4.1	4.1	5.1
TEXARKANA	45,700	45,890	43,560	3,490	3,590	3,350	7.1	7.3	7.1
TYLER	62,190	61,760	59,770	2,690	2,490	2,630	4.1	3.9	4.2
WACO	77,040	76,060	73,820	2,850	2,900	3,260	3.6	3.7	4.2
WICHITA FALLS	58,890	58,540	57,200	1,650	1,790	2,030	2.7	3.0	3.4

†Sum of estimated number of total employed and unemployed workers residing in the specified areas.
‡Includes resident wage and salary workers, self-employed, unpaid family workers and domestics in private households, agricultural workers and workers involved in labor-management disputes.
*Preliminary—subject to revision. **Revised.

TEXAS LABOR MARKET REVIEW
Official Publication of
TEXAS EMPLOYMENT COMMISSION
NOLAN F. WARD ..... Chairman
KEN CLAPP ..... Commissioner
A.C. SHIRLEY ..... Commissioner
ERNIE W. TULLIS, Administrator

Published Monthly at the TEC Building, Austin, Texas
Economic Research and Analysis Department

ufacturing was recorded in the electric and electronic equipment portion of durable goods. The gain was spread throughout the industry and appeared to be part of an upward trend which has been going on in this industry since the beginning of last year. Since January 1978, employment in electric and electronic equipment has increased 23,000, or 28.5 percent.

Over the past year a steady increase has also been evident in the oil field machinery segment of nonelectrical machinery. This climb has been attributed to firms that are drilling and producing oil. During the past year, oil field machinery has accounted for 62 percent of the gain in nonelectrical machinery and it was entirely reponsible for the rise over the last month in the industry. Aircraft and parts continued to increase as it led the transportation equipment segment to a moderate advance.

Among the industries in nondurable goods, chemicals and allied products made the most substantial improvement. The settlement of a labor-management dispute was primarily responsible for the gain. Apparel and other finished textile products was up moderately also as increases were recorded in men's and boys' suits, coats, and furnishings. This increase was most noticeable in an industry which has suffered a sizeable decline during the past year. Petroleum refining took a modest upswing and led to a gain in petroleum and coal products as consumer demand for petroleum products remained high.

The sectors within nonmanufacturing were led by government, but others managed to post improved employment levels as well. Construction was up considerably as heavy construction and special trade construction led in employment advances. Decreases were noted, however, in residential construction and highway construction. Services also experienced an upturn in employment as all segments of the industry except amusements were up. Educational services realized the greatest advance as the school term was well underway. The highest increases were posted in junior colleges and community colleges. Substantial growth was also recorded in personal services and business and repair services. Just over 75 percent of the gain in business and repair services was attributed to business services. Miscellaneous repair services was responsible for a considerable upturn as electrical, upholstery, and furniture repair services experienced greater business activity. Automotive repair recorded a modest decline over the month. Within the other services and miscellaneous segment of services accounting, auditing, and bookkeeping services posted the largest gains.

Trade registered a significant advance, primarily on the strength of gains made within the wholesale trade segment. The rise in wholesale trade was attributed to a large amount of seasonal work. Retail trade also showed improvement, but much of the increase in the segment was offset by declines in food stores and automotive dealers and service stations. The growing trend toward fewer hours of operation and more self-service stations contributed to the decreases, but lagging sales among new car dealers was also partially responsible for the drop in automotive dealers and service stations.

Finance, insurance, and real estate posted a moderate advance as all segments were up slightly due to scattered increases. Transportation and public utilities rose primarily due to a moderate gain in transportation by air. A single firm was largely responsible for the gain as the rest of the industry managed only minor fluctuations in employment. Mining decreased modestly as employment in oil and gas extraction underwent a minor reduction.

HOURLY EARNINGS ADVANCE

An average production worker in manufacturing earned seven cents per hour more in October than in September, and 67 cents an hour more than in October 1978. Over the same period average weekly hours (AWH) have declined from 41.5 hours a year ago to 41.1 last month and 41.0 for October. Transportation equipment realized gains of 27 cents per hour in average hourly earnings (AHE) and 0.4 hours in AWH. Wage rate increases provided by union contract agreements led to these gains. Textile mill products reported advances in AWH and AHE as some firms lost many of their lower-paid temporary workers, while other firms reported overtime worked at premium pay. Increased overtime contributed to advances in meat products, where a large wage rate increase also led to the upswing. Nonelectrical machinery was up 8 cents in AHE, but unchanged in AWH. The gain was a direct result of an 18 cent rise in AHE in the oil field machinery segment, where increased overtime and wage rate advances were noted. A seasonal rise in sales led to higher commissions and a substantial gain in AHE in general merchandise stores. Fewer entry-level production workers in other printing and publishing and seasonal cutbacks of lower-paid workers in newspapers, periodicals, books and miscellaneous publishing resulted in fewer AWH, but increased AHE.

INSURED UNEMPLOYED UP SLIGHTLY

Statewide insured unemployment under the regular program rose slightly from mid-September to mid-October. A gain of 1.3 percent was noted as the number of insured unemployed increased from 47,844 a month ago to the October level of 48,474. The State's insured unemployment rate was 0.9 percent for October, compared to 1.1 percent in September and 1.1 percent a year ago. The National insured unemployment rate was 2.5 percent, just above the month-ago rate of 2.4 percent and identical to the year-ago rate.

HOURS AND EARNINGS IN TEXAS*

SOURCE: TEXAS EMPLOYMENT COMMISSION IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS, U.S. DEPARTMENT OF LABOR

	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	OCT† 1979	SEP 1979	OCT 1978	OCT† 1979	SEP 1979	OCT 1978	OCT† 1979	SEP 1979	OCT 1978
FOR TEXAS									
MANUFACTURING—TOTAL	$272.24	$270.03	$247.78	41.0	41.1	41.5	$6.64	$6.57	$5.97
DURABLE GOODS	276.22	274.80	245.02	41.6	41.7	41.6	6.64	6.59	5.89
LUMBER & WOOD PRODUCTS	226.46	224.80	188.90	43.3	42.9	40.8	5.23	5.24	4.63
FURNITURE & FIXTURES	190.80	191.43	169.03	40.0	40.3	39.4	4.77	4.75	4.29
STONE, CLAY & GLASS PRODS.	269.18	271.04	245.16	44.2	44.0	43.7	6.09	6.16	5.61
PRIMARY METAL INDUSTRIES	369.80	360.39	304.37	42.9	42.2	40.8	8.62	8.54	7.46
FABRICATED METAL PRODUCTS	272.90	279.65	256.15	41.6	42.5	42.2	6.56	6.58	6.07
MACHINERY, EXCEPT ELEC.	283.45	280.13	259.30	41.5	41.5	42.3	6.83	6.75	6.13
OIL FIELD MACHINERY	339.83	329.80	313.05	42.8	42.5	43.6	7.94	7.76	7.18
ELEC. & ELECTRONIC EQUIP.	240.12	243.01	215.28	39.3	40.1	41.4	6.11	6.06	5.20
TRANSPORTATION EQUIPMENT	343.62	329.25	282.91	41.3	40.9	40.3	8.32	8.05	7.02
AIRCRAFT & PARTS	357.43	351.54	329.87	42.1	41.8	42.4	8.49	8.41	7.78
INSTR. & RELATED PRODUCTS	209.04	210.00	183.81	40.2	40.0	39.7	5.20	5.25	4.63
MISC. MFG. INDUSTRIES	193.87	187.40	191.36	40.9	40.3	41.6	4.74	4.65	4.60
NONDURABLE GOODS	265.86	264.37	252.74	40.1	40.3	41.5	6.63	6.56	6.09
FOOD & KINDRED PRODUCTS	245.70	238.71	232.73	42.0	42.1	43.5	5.85	5.67	5.35
MEAT PRODUCTS	254.45	244.80	245.06	43.2	42.5	44.8	5.89	5.76	5.47
MALT BEVERAGES	496.02	463.66	418.33	46.4	43.7	42.6	10.69	10.61	9.82
TEXTILE MILL PRODUCTS	208.55	198.01	177.96	43.0	42.4	41.1	4.85	4.67	4.33
APPRL. & OTHER TEXT PROD.	141.68	141.99	129.18	36.8	36.5	36.7	3.85	3.89	3.52
PAPER & ALLIED PRODUCTS	288.89	292.04	274.99	41.3	41.9	42.9	6.99	6.97	6.41
PRINTING & PUBLISHING	242.55	242.87	222.34	38.5	39.3	38.6	6.30	6.18	5.76
CHEMICALS & ALLIED PRODS.	419.47	418.06	392.86	42.2	42.4	43.7	9.94	9.86	8.99
PETROLEUM & COAL PRODUCTS	388.73	385.26	402.19	40.2	39.8	44.1	9.67	9.68	9.12
PETROLEUM REFINING	397.79	393.79	413.76	39.7	39.3	43.6	10.02	10.02	9.49
LEATHER & LEATHER PRODUCTS	142.50	146.66	123.46	37.5	38.0	36.1	3.80	3.86	3.42
OTHER NONDURABLE GOODS	231.85	240.53	232.21	39.7	41.4	44.4	5.84	5.81	5.23
NONMANUFACTURING									
MINING	349.68	345.11	315.79	46.5	46.2	45.9	7.52	7.47	6.88
OIL & GAS EXTRACTION	351.83	346.50	318.07	46.6	46.2	45.7	7.55	7.50	6.96
OTHER MINING & QUARRYING**	304.04	310.46	INA	44.0	46.2	INA	6.91	6.72	INA
COMMUNICATIONS, EXCEPT U.S. POSTAL SERV.	320.25	317.83	289.68	40.9	41.2	40.8	7.83	7.86	7.10
ELEC., GAS & SAN. SVCS.	313.65	311.10	286.47	42.1	41.3	41.1	7.45	7.54	6.97
WHOLESALE & RETAIL TRADE	188.33	186.13	172.34	35.4	35.3	35.1	5.32	5.27	4.91
WHOLESALE TRADE	274.18	271.08	247.82	40.8	40.1	40.1	6.72	6.76	6.18
RETAIL TRADE	153.05	151.18	141.24	33.2	33.3	33.0	4.61	4.54	4.28
GENERAL MDSE. STORES	128.76	124.27	112.48	29.6	29.8	29.6	4.35	4.17	3.80
BANKING	167.93	168.52	161.57	37.4	37.2	37.4	4.49	4.53	4.32
FOR THE MAJOR MARKETS									
AMARILLO									
MANUFACTURING	264.12	260.71	242.78	42.6	42.6	41.5	6.20	6.12	5.85
DURABLE GOODS	286.96	283.16	257.81	42.2	42.2	40.6	6.80	6.71	6.35
NONDURABLE GOODS	244.53	241.23	232.39	42.9	43.0	42.1	5.70	5.61	5.52
AUSTIN									
MANUFACTURING	207.24	206.23	191.78	41.2	41.0	41.6	5.03	5.03	4.61
DURABLE GOODS	211.00	209.90	197.50	41.7	41.4	42.2	5.06	5.07	4.68
NONDURABLE GOODS	192.18	191.48	177.68	39.3	39.4	40.2	4.89	4.86	4.42
BEAUMONT									
MANUFACTURING	370.87	368.10	353.14	40.4	40.9	41.4	9.18	9.00	8.53
DURABLE GOODS	328.44	328.64	283.71	40.8	41.6	40.3	8.05	7.90	7.04
NONDURABLE GOODS	393.16	388.80	386.32	40.2	40.5	41.9	9.78	9.60	9.22
CORPUS CHRISTI									
MANUFACTURING	309.37	319.84	302.60	40.6	41.7	42.8	7.62	7.67	7.07
DURABLE GOODS	248.62	256.06	222.60	40.1	41.3	40.4	6.20	6.20	5.51
NONDURABLE GOODS	340.68	353.22	343.98	40.8	41.9	44.1	8.35	8.43	7.80
DALLAS/FT. WORTH									
MANUFACTURING	253.17	253.17	229.04	40.9	41.3	40.9	6.19	6.13	5.60
DURABLE GOODS	269.19	267.76	241.26	41.8	42.1	41.1	6.44	6.36	5.87
NONDURABLE GOODS	221.87	223.34	206.15	39.2	39.6	40.5	5.66	5.64	5.09
EL PASO									
MANUFACTURING	201.20	205.59	185.77	40.0	41.2	41.1	5.03	4.99	4.52
DURABLE GOODS	252.72	256.82	246.79	40.5	40.7	41.2	6.24	6.31	5.99
NONDURABLE GOODS	185.07	190.39	167.28	39.8	41.3	41.0	4.65	4.61	4.08
GALVESTON									
MANUFACTURING	420.85	415.48	410.77	42.9	43.1	42.7	9.81	9.64	9.62
DURABLE GOODS	362.09	363.49	327.92	42.3	43.9	41.3	8.56	8.28	7.94
NONDURABLE GOODS	452.49	441.76	450.32	43.3	42.6	43.3	10.45	10.37	10.40
HOUSTON									
MANUFACTURING	344.67	343.37	314.79	43.3	43.3	43.3	7.96	7.93	7.27
DURABLE GOODS	323.76	324.38	297.03	43.4	43.6	42.8	7.46	7.44	6.94
NONDURABLE GOODS	378.42	373.20	345.54	43.1	42.7	44.3	8.78	8.74	7.80
LUBBOCK									
MANUFACTURING	207.67	205.67	182.66	41.7	41.3	40.5	4.98	4.98	4.51
DURABLE GOODS	200.33	199.26	173.93	40.8	40.5	39.8	4.91	4.92	4.37
NONDURABLE GOODS	227.04	223.51	206.49	44.0	43.4	42.4	5.16	5.15	4.87
SAN ANTONIO									
MANUFACTURING	199.10	199.51	179.20	40.8	40.8	40.0	4.88	4.89	4.48
DURABLE GOODS	208.92	206.00	181.19	41.7	41.2	40.9	5.01	5.00	4.43
NONDURABLE GOODS	189.13	192.71	176.79	39.9	40.4	39.2	4.74	4.77	4.51
WACO									
MANUFACTURING	237.86	239.03	210.14	40.8	41.0	39.8	5.83	5.83	5.28
DURABLE GOODS	247.63	248.39	223.51	41.9	42.1	41.7	5.91	5.90	5.36
NONDURABLE GOODS	226.51	228.05	196.56	39.6	39.8	37.8	5.72	5.73	5.20
WICHITA FALLS									
MANUFACTURING	235.22	241.35	215.74	39.4	39.5	40.1	5.97	6.11	5.38
DURABLE GOODS	251.06	258.45	227.51	39.6	39.7	40.7	6.34	6.51	5.59
NONDURABLE GOODS	183.26	190.81	182.78	38.5	39.1	38.4	4.76	4.88	4.76

*Figures cover Production Workers in Manufacturing and Mining industries only and Nonsupervisory Employees in other industry divisions. Earnings' averages include premium pay for overtime, holidays, and for late-shift work. †Preliminary—subject to revisions upon receipt of additional reports. **Data for prior years not comparable to current series.

NONAGRICULTURAL WAGE AND SALARY† ESTIMATES—TEXAS

INDUSTRY	OCT* 1979	SEP** 1979	OCT** 1978	CHANGE FROM SEP 1979	CHANGE FROM OCT 1978
‡TOTAL NONAGRICULTURAL EMPLOYMENT	5,593,400	5,562,400	5,341,100	31,000	252,300
MANUFACTURING	1,007,200	1,001,700	970,000	5,500	37,200
DURABLE GOODS	582,700	579,900	556,300	2,800	26,400
LUMBER & WOOD PRODUCTS	39,900	39,700	39,300	200	600
LOGGING CAMPS, SAWMILLS, PLANING MILLS	9,300	9,300	8,900	0	400
FURNITURE & FIXTURES	16,300	16,000	18,400	300	— 2,100
STONE, CLAY & GLASS PRODUCTS	44,500	44,500	43,000	0	1,500
CONCRETE, GYPSUM & PLASTER PRODUCTS	18,500	18,500	17,700	0	800
PRIMARY METAL INDUSTRIES	43,800	44,100	43,200	— 300	600
FABRICATED METAL PRODUCTS	88,100	88,100	87,500	0	600
FABRICATED STRUCTURAL METAL PRODUCTS	45,200	45,300	45,600	— 100	— 400
MACHINERY, EXCEPT ELECTRICAL	139,300	138,900	135,100	400	4,200
OIL FIELD MACHINERY	55,800	55,400	53,200	400	2,600
ELECTRIC & ELECTRONIC EQUIPMENT	103,600	102,400	90,400	1,200	13,200
TRANSPORTATION EQUIPMENT	76,700	76,100	70,100	600	6,600
AIRCRAFT & PARTS	45,300	44,900	39,500	400	5,800
INSTRUMENTS & RELATED PRODUCTS	18,100	17,900	17,400	200	700
MISCELLANEOUS MANUFACTURING INDUSTRIES	12,400	12,200	11,900	200	500
NONDURABLE GOODS	424,500	421,800	413,700	2,700	10,800
FOOD AND KINDRED PRODUCTS	99,100	98,400	97,400	700	1,700
MEAT PRODUCTS	26,600	26,400	25,700	200	900
DAIRY PRODUCTS	5,200	5,300	5,300	— 100	— 100
BAKERY PRODUCTS	10,500	10,400	10,700	100	— 200
MALT BEVERAGES	3,400	3,500	3,300	— 100	100
TEXTILE MILL PRODUCTS	6,200	6,100	6,300	100	— 100
APPAREL & OTHER FINISHED TEXTILE PRODUCTS	71,600	71,300	73,000	300	— 1,400
PAPER & ALLIED PRODUCTS	21,800	21,800	21,600	0	200
PRINTING & PUBLISHING	58,900	58,700	55,600	200	3,300
NEWSPAPER, PERIODICALS, BOOKS & MISC. PUBL.	31,900	31,700	29,600	200	2,300
CHEMICALS & ALLIED PRODUCTS	81,100	80,400	78,900	700	2,200
PETROLEUM & COAL PRODUCTS	43,700	43,300	42,900	400	800
PETROLEUM REFINING	40,200	39,900	39,300	300	900
LEATHER & LEATHER PRODUCTS	7,800	7,800	8,000	0	— 200
OTHER NONDURABLE GOODS	34,300	34,000	30,000	300	4,300
TOTAL NONMANUFACTURING	4,586,200	4,560,700	4,371,100	25,500	215,100
MINING	198,300	198,600	184,700	— 300	13,600
OIL & GAS EXTRACTION	189,400	189,700	176,300	— 300	13,100
OTHER MINING & QUARRYING	8,900	8,900	8,400	0	500
CONSTRUCTION	410,900	407,900	390,000	3,000	20,900
TRANSPORTATION & PUBLIC UTILITIES	353,800	353,700	339,300	100	14,500
RAILROAD TRANSPORTATION	31,500	31,500	31,000	0	500
TRANSPORTATION, EXCEPT RAILROADS	176,700	176,600	169,800	100	6,900
TRANSPORTATION BY AIR	34,200	33,900	30,600	300	3,600
COMMUNICATION	78,800	78,800	76,400	0	2,400
ELECTRIC, GAS & SANITARY SERVICES	66,800	66,800	62,100	0	4,700
ELECTRIC SERVICES	35,900	35,700	32,600	200	3,300
GAS PRODUCTION & DISTRIBUTION	26,600	26,800	25,500	— 200	1,100
WHOLESALE & RETAIL TRADE	344,400	341,500	297,100	2,900	47,300
WHOLESALE TRADE	390,500	388,500	376,200	2,000	14,300
RETAIL TRADE	953,900	953,000	920,900	900	33,000
BUILDING MATERIALS & GARDEN SUPPLIES	44,400	44,100	42,500	300	1,900
GENERAL MERCHANDISE STORES	135,500	134,100	132,700	1,400	2,800
FOOD STORES	157,100	157,800	148,300	— 700	8,800
AUTOMOTIVE DEALERS & SERVICE STATIONS	122,700	123,700	125,400	— 1,000	— 2,700
APPAREL & ACCESSORY STORES	70,700	70,400	68,000	300	2,700
OTHER RETAIL TRADE	423,500	422,900	404,000	600	19,500
FINANCE, INSURANCE & REAL ESTATE	314,400	313,300	300,900	1,100	13,500
BANKING	83,900	83,500	78,100	400	5,800
INSURANCE CARRIERS, AGENTS & BROKERS	107,000	106,900	105,800	100	1,200
OTHER FINANCE, INSURANCE & REAL ESTATE	123,500	122,900	117,000	600	6,500
SERVICES	945,400	939,200	900,200	6,200	45,200
HOTELS & OTHER LODGING PLACES	55,700	55,200	54,200	500	1,500
PERSONAL SERVICES	66,700	65,700	62,400	1,000	4,300
BUSINESS & REPAIR SERVICES	238,900	235,600	221,300	3,300	17,600
AMUSEMENT, INCLUDING MOTION PICTURES	39,800	41,000	38,200	— 1,200	1,600
HEALTH SERVICES	249,600	249,000	244,900	600	4,700
EDUCATIONAL SERVICES	50,800	49,700	49,400	1,100	1,400
OTHER SERVICES & MISCELLANEOUS	243,900	243,000	229,800	900	14,100
TOTAL GOVERNMENT	1,019,000	1,006,500	958,900	12,500	60,100
TOTAL FEDERAL GOVERNMENT	158,100	160,300	158,900	— 2,200	— 800
TOTAL STATE GOVERNMENT	206,800	202,700	205,600	4,100	1,200
TOTAL LOCAL GOVERNMENT	654,100	643,500	594,400	10,600	59,700
TOTAL MANUFACTURING PRODUCTION WORKERS	691,700	687,800	671,900	3,900	19,800
DURABLE GOODS	395,500	393,200	381,000	2,300	14,500
NONDURABLE GOODS	296,200	294,600	290,900	1,600	5,300

†Estimated number of nonagricultural jobs in Texas without reference to place of residence of workers. ‡Estimates of TEC in cooperation with Bureau of Labor Statistics and Employment and Training Administration, U.S. Department of Labor. *Preliminary—subject to revision. **Revised.

DROP POSTED IN FARM EMPLOYMENT

Total agricultural employment in Texas declined from 190,000 at mid-September to 184,600 at mid- October.

Seasonal employment during October stood at 56,400, well below the 65,400 recorded for the same period the previous year. The cotton harvest was in full swing in parts of Central Texas as seasonal employment in cotton activities was 7,050, less than the year-ago level of 7,800. Seasonal employment in vegetable activities was down from 10,900 last year to 8,600. A lack of rainfall caused wheat planting to fall behind schedule as feed and grain activities employed 22,000 seasonal workers compared to 24,300 a year ago. Pastures also were in need of rainfall across most of the State. The pecan harvest got underway in Central and south Central Texas during the month.

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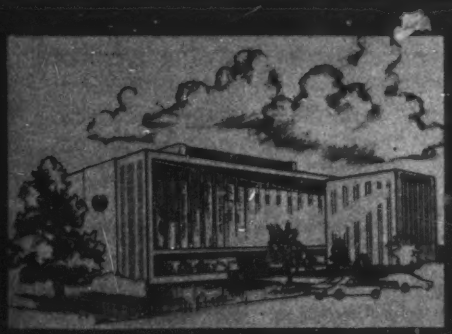

TEXAS LABOR MARKET REVIEW

T.E.C. BUILDING | DECEMBER 1979 | AUSTIN, TEXAS 78778

EMPLOYMENT IN TEXAS DECLINES

A reduction of over 25,000 was recorded in Statewide employment from mid-October to mid-November. A period of inclement winter weather curtailed outdoor activity across most of the State causing employment drops in such fields as construction and agriculture. During this same month, unemployment made a sharp upswing as more people entered the labor force to seek temporary employment for the approaching holiday season. Many sought temporary work as a means of earning extra income with which to buy Christmas presents.

The rise in unemployment led to a net gain in the State's civilian labor force of 7,700 and an advance in the unemployment rate of half a percentage point. The November unemployment rate of 4.3 percent, while up significantly from mid-October, was still below the year-ago rate of 4.8 percent. The current rate for November is the lowest for the month since 1973, when the unemployment rate was 3.6 percent. The National unemployment rate was unchanged from October to November at 5.6 percent. The seasonally adjusted unemployment rate during November was 4.4 percent for Texas and 5.8 percent for the United States.

All of the major labor market areas in the State saw their unemployment levels go up by varying degrees. Only one area did not experience a rise in its unemployment rate over the month. An influx of migrant farmworkers into the major labor market areas along the Lower Rio Grande Valley caused those counties to realize the largest increases in total unemployment. Twenty of the 25 major labor market areas maintained unemployment rates of less than 6.0 percent for November.

ADVANCES NOTED IN WAGE AND SALARY

A significant increase of over 23,000 was recorded in total nonagricultural wage and salary employment from October to November. Gains were noted throughout the manufacturing and nonmanufacturing sectors, but over 40 percent of the increase occurred in trade alone. The advance in trade generally occurs this time every year as stores prepare for the holiday shopping season.

Nonagricultural wage and salary employment in manufacturing rose considerably over the month primarily on the strength of gains posted in the durable goods sector. The largest single increase was recorded in nonelectrical machinery. The majority of the gain in nonelectrical machinery occurred in oil

SUMMARY OF LABOR FORCE† ESTIMATES

	TOTAL EMPLOYMENT‡			TOTAL UNEMPLOYMENT			UNEMPLOYED AS % OF LABOR FORCE		
	NOV* 1979	OCT** 1979	NOV** 1978	NOV* 1979	OCT** 1979	NOV** 1978	NOV* 1979	OCT** 1979	NOV** 1978
STATEWIDE	6,002,900	6,028,400	5,808,000	268,700	235,500	291,900	4.3	3.8	4.8
ABILENE	65,230	65,520	62,720	2,000	1,750	2,070	3.0	2.6	3.2
AMARILLO	86,390	86,400	83,000	2,870	2,610	3,240	3.2	2.9	3.8
AUSTIN	243,250	243,600	232,750	7,750	7,000	8,000	3.1	2.8	3.3
BEAUMONT-PORT ARTHUR-ORANGE	155,050	156,550	156,150	8,900	7,650	11,050	5.4	4.7	6.6
BROWNSVILLE-HARLINGEN-SAN BENITO	64,270	63,980	65,000	6,950	5,600	8,130	9.8	8.0	11.1
BRYAN-COLLEGE STATION	37,980	38,110	36,280	920	880	1,060	2.4	2.3	2.8
CORPUS CHRISTI	126,650	126,400	125,000	7,250	6,100	7,000	5.4	4.6	5.3
DALLAS-FORT WORTH	1,452,600	1,458,500	1,370,700	49,900	46,200	53,200	3.3	3.1	3.7
EL PASO	160,400	159,550	155,050	14,150	12,150	15,450	8.1	7.1	9.1
GALVESTON-TEXAS CITY	78,330	78,910	78,350	3,950	3,470	5,230	4.8	4.2	6.3
HOUSTON	1,372,500	1,376,600	1,320,600	47,200	43,300	56,400	3.3	3.0	4.1
KILLEEN-TEMPLE	60,430	60,690	59,750	3,270	2,970	3,150	5.1	4.7	5.0
LAREDO	30,540	28,380	26,500	3,940	2,850	4,400	11.4	9.1	14.2
LONGVIEW—MARSHALL	61,680	62,240	60,450	3,710	3,100	3,660	5.7	4.7	5.7
LUBBOCK	100,600	101,030	100,110	3,160	3,140	3,410	3.0	3.0	3.3
MCALLEN-PHARR-EDINBURG	81,040	78,060	77,980	13,220	10,510	12,740	14.0	11.9	14.0
MIDLAND	45,020	45,040	43,490	1,400	1,150	1,750	3.0	2.5	3.9
ODESSA	60,470	60,590	57,550	2,040	1,730	2,630	3.3	2.8	4.4
SAN ANGELO	41,920	42,020	39,900	1,260	1,120	1,680	2.9	2.6	4.0
SAN ANTONIO	391,950	394,200	382,800	23,350	21,200	25,950	5.6	5.1	6.3
SHERMAN-DENISON	38,050	38,540	36,670	1,910	1,670	2,010	4.8	4.2	5.2
TEXARKANA	45,110	46,100	43,590	4,860	3,520	3,680	9.7	7.1	7.8
TYLER	61,460	62,140	59,480	3,030	2,680	2,880	4.7	4.1	4.6
WACO	76,500	76,330	73,810	3,030	2,850	3,780	3.8	3.6	4.9
WICHITA FALLS	58,480	58,870	57,350	1,970	1,640	2,540	3.3	2.7	4.2

†Sum of estimated number of total employed and unemployed workers residing in the specified areas.
‡Includes resident wage and salary workers, self-employed, unpaid family workers and domestics in private households, agricultural workers and workers involved in labor-management disputes.
*Preliminary—subject to revision. **Revised.

TEXAS LABOR MARKET REVIEW
Official Publication of
TEXAS EMPLOYMENT COMMISSION
NOLAN F. WARD ..... Chairman
KEN CLAPP ..... Commissioner
A.C. SHIRLEY ..... Commissioner
ERNIE W. TULLIS, Administrator

Published Monthly at the TEC Building, Austin, Texas
Economic Research and Analysis Department

field machinery. The advance in electric and electronic equipment was only 100 less than that posted in nonelectrical machinery. This latest increase appears to be the continuation of a strong growth trend within the electric and electronic equipment industry.

Firms which manufacture tinsel, Christmas tree ornaments, and novelties led the miscellaneous manufacturing segment of durable goods to a sizeable gain in employment. The aircraft and parts portion of transportation equipment rose slightly over the month. Most of the gain was posted by those manufacturers who produce the finished aircraft. Those industries whose products are construction-related showed little or no growth from October to November. Lumber and wood products was up slightly, as was primary metal industries. Furniture and fixtures, however, declined slightly, while stone, clay, and glass products and fabricated metal products showed no change from a month ago.

The most substantial gain in the nondurable goods sector was registered by the newspaper, periodicals, books, and miscellaneous publications segment of printing and publishing. Christmas catalogs and telephone directories contributed to the seasonal workload in miscellaneous publications. The meat products portion of food and kindred products experienced a large gain as the demand for items such as hams and turkeys for the holidays was high. A moderate advance was recorded in apparel and other textile products. The increase was attributed to higher sales of men's and boys' suits and furnishings. Despite the over-the-month advance, apparel and other textile products was at a level of employment which was 1,000 less than the November 1978 figure. During the past few years the apparel and other textile products industry has faced stiffer competition from foreign manufacturers. The amount of foreign goods in the U.S. market has gradually climbed to a level where it has affected production and employment among American manufacturers.

Nonmanufacturing was up considerably as seasonal increases were most evident in retail trade. General merchandise stores and apparel and accessory stores led the segment with sizeable gains from October to November. The beginning of the Christmas shopping season was responsible for the surge in employment. Other segments with large gains were food stores, and other retail trade, which includes drug stores, liquor stores, sporting goods stores, jewelry stores, mail order houses, and other types of specialty shops. The only loss evident within retail trade was in automotive dealers and service stations, where new car sales were off and gas allocations reduced the need for additional personnel. The drop in new car sales can be attributed to many things; most people are taking a cautious attitude in regard to the economy and are hesitant to finance large items such as homes and automobiles, money is tight and interest rates are rising, and dealers with supplies of larger cars which burn more fuel simply cannot move their stock readily in what has become an economy car market.

Employment in mining was up substantially with over 90 percent of the rise in oil and gas extraction. High consumer demand and efforts to produce more oil and gas at home rather than import these commodities has led to the gain in mining. Construction was the only major segment of nonmanufacturing to suffer a decline. Most of the decrease occurred in general building and heavy construction and was attributed to bad weather conditions. Special trade construction rose, but not significantly enough to offset the losses in other areas of construction.

The business and repair services portion of services accounted for 96 percent of the increase in the division. The large gain in business and repair services was attributed to increases in advertising services, where retail trade establishments in particular were stepping up activity for the Christmas season. Also in services, the accounting, auditing, and bookkeeping services segment of other services and miscellaneous contributed to higher employment in the industry as many of these firms were involved in end-of-quarter reports. Increases in government were posted in the educational sectors of state and local government. These gains were composed mainly of student and research position hires in higher education, and substitute teacher and bus driver hires in the public school systems.

HOURS AND EARNINGS INCREASE

Average weekly hours (AWH) were up from 41.0 in October to 41.6 in November, while average hourly earnings (AHE) were also up from $6.61 to $6.64 over the same period for production workers in Texas. Wage rate increases led to higher AHE in several industries, notably aircraft and parts, nonelectrical machinery (including oil field machinery), and apparel and other textile products. Higher commissions contributed to a gain in AHE in wholesale trade. Increased overtime worked at premium pay rates caused advances in both AWH and AHE in petroleum and coal products, paper and allied products, and other mining and quarrying. Fabricated metal products saw AWH go up as more overtime was recorded, but AHE fell slightly because the overtime was worked by lower-paid, entry-level production employees.

HOURS AND EARNINGS IN TEXAS*

SOURCE: TEXAS EMPLOYMENT COMMISSION IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS, U.S. DEPARTMENT OF LABOR

	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	NOV† 1979	OCT 1979	NOV 1978	NOV† 1979	OCT 1979	NOV 1978	NOV† 1979	OCT 1979	NOV 1978
FOR TEXAS									
MANUFACTURING—TOTAL	$276.22	$271.01	$252.05	41.6	41.0	42.8	$6.64	$6.61	$6.03
DURABLE GOODS	279.60	273.73	250.56	42.3	41.6	41.9	6.61	6.58	5.98
LUMBER & WOOD PRODUCTS	224.12	224.55	191.53	43.1	43.1	41.1	5.20	5.21	4.66
FURNITURE & FIXTURES	189.13	188.80	169.06	39.9	40.0	39.5	4.74	4.72	4.28
STONE, CLAY & GLASS PRODS.	274.67	272.09	242.54	45.4	45.5	42.7	6.05	5.98	5.68
PRIMARY METAL INDUSTRIES	355.14	351.90	315.09	41.2	41.4	41.9	8.62	8.50	7.52
FABRICATED METAL PRODUCTS	276.48	271.41	258.92	43.2	41.5	42.1	6.40	6.54	6.15
MACHINERY, EXCEPT ELEC.	294.37	282.88	266.64	42.6	41.6	42.8	6.91	6.80	6.23
OIL FIELD MACHINERY	351.79	335.40	325.57	43.7	43.0	43.7	8.05	7.80	7.45
ELEC. & ELECTRONIC EQUIP.	242.17	239.00	220.06	40.7	39.9	42.4	5.95	5.99	5.19
TRANSPORTATION EQUIPMENT	349.43	343.61	301.76	41.5	41.2	41.0	8.42	8.34	7.36
AIRCRAFT & PARTS	378.75	357.01	337.76	42.7	42.1	42.7	8.87	8.48	7.91
INSTR. & RELATED PRODUCTS	203.43	209.04	190.28	39.5	40.2	40.4	5.15	5.20	4.71
MISC. MFG. INDUSTRIES	198.43	191.02	193.07	41.6	40.3	41.7	4.77	4.74	4.63
NONDURABLE GOODS	271.21	266.26	254.37	40.6	40.1	41.7	6.68	6.64	6.10
FOOD & KINDRED PRODUCTS	253.00	247.29	236.96	43.1	42.2	43.4	5.87	5.86	5.46
MEAT PRODUCTS	258.55	254.45	243.60	44.5	43.2	43.5	5.81	5.89	5.60
MALT BEVERAGES	487.46	498.15	429.97	45.9	46.6	43.3	10.62	10.69	9.93
TEXTILE MILL PRODUCTS	198.24	208.55	177.53	41.3	43.0	41.0	4.80	4.85	4.33
APPRL. & OTHER TEXT PROD.	143.61	141.68	132.35	36.5	36.8	37.6	3.94	3.85	3.52
PAPER & ALLIED PRODUCTS	303.29	289.39	275.85	42.3	41.4	42.9	7.17	6.99	6.43
PRINTING & PUBLISHING	247.23	241.92	228.05	40.2	38.4	39.8	6.15	6.30	5.73
CHEMICALS & ALLIED PRODS.	416.33	418.47	392.40	41.8	42.1	43.6	9.96	9.94	9.00
PETROLEUM & COAL PRODUCTS	411.10	388.00	401.28	41.4	40.0	44.0	9.93	9.70	9.12
PETROLEUM REFINING	420.86	397.98	414.86	40.9	39.6	43.9	10.29	10.05	9.45
LEATHER & LEATHER PRODUCTS	144.02	144.40	123.55	38.0	37.9	35.0	3.79	3.81	3.53
OTHER NONDURABLE GOODS	239.13	231.05	232.41	40.6	39.7	44.1	5.89	5.82	5.27
NONMANUFACTURING									
MINING	353.99	349.86	312.75	46.7	46.4	45.0	7.58	7.54	6.95
OIL & GAS EXTRACTION	355.39	352.47	315.20	46.7	46.5	44.9	7.61	7.58	7.02
OTHER MINING & QUARRYING**	314.41	291.27	INA	45.5	43.8	INA	6.91	6.65	INA
COMMUNICATIONS, EXCEPT U.S. POSTAL SERV.	317.09	315.46	292.03	40.6	40.6	40.9	7.81	7.77	7.14
ELEC., GAS & SAN. SVCS.	325.78	313.58	287.31	42.2	41.7	41.7	7.72	7.52	6.89
WHOLESALE & RETAIL TRADE	188.68	187.44	175.58	35.4	35.3	35.4	5.33	5.31	4.96
WHOLESALE TRADE	277.30	272.83	250.97	40.6	40.6	39.9	6.83	6.72	6.29
RETAIL TRADE	152.06	152.59	145.49	33.2	33.1	33.6	4.58	4.61	4.33
GENERAL MDSE. STORES	125.27	126.73	111.43	29.2	29.2	29.4	4.29	4.34	3.79
BANKING	171.31	168.07	159.38	37.9	37.6	37.5	4.52	4.47	4.25
FOR THE MAJOR MARKETS									
AMARILLO									
MANUFACTURING	263.95	261.84	230.10	42.3	42.3	39.0	6.24	6.19	5.90
DURABLE GOODS	283.33	285.27	254.00	42.1	42.2	40.0	6.73	6.76	6.35
NONDURABLE GOODS	245.76	241.11	213.33	42.3	42.3	38.3	5.81	5.70	5.57
AUSTIN									
MANUFACTURING	206.55	208.06	200.22	40.9	41.2	42.6	5.05	5.05	4.70
DURABLE GOODS	210.73	211.74	205.59	41.4	41.6	43.1	5.09	5.09	4.77
NONDURABLE GOODS	190.81	192.57	184.99	39.1	39.3	41.2	4.88	4.90	4.49
BEAUMONT									
MANUFACTURING	375.65	377.20	359.06	41.1	41.0	41.8	9.14	9.20	8.59
DURABLE GOODS	332.77	332.54	305.76	41.7	42.2	42.0	7.98	7.88	7.28
NONDURABLE GOODS	399.18	399.78	386.23	40.9	40.3	41.8	9.76	9.92	9.24
CORPUS CHRISTI									
MANUFACTURING	295.42	309.32	295.22	39.6	40.7	42.6	7.46	7.60	6.93
DURABLE GOODS	246.54	248.86	218.99	39.7	40.4	39.6	6.21	6.16	5.53
NONDURABLE GOODS	320.35	340.68	333.08	39.5	40.8	44.0	8.11	8.35	7.57
DALLAS/FT. WORTH									
MANUFACTURING	257.72	252.76	238.63	41.5	40.9	41.5	6.21	6.18	5.75
DURABLE GOODS	273.00	268.13	253.73	42.0	41.7	41.8	6.50	6.43	6.07
NONDURABLE GOODS	226.64	221.09	210.12	40.4	39.2	40.8	5.61	5.64	5.15
EL PASO									
MANUFACTURING	206.95	200.15	189.24	38.9	39.4	41.5	5.32	5.08	4.56
DURABLE GOODS	260.55	253.31	241.19	39.9	40.4	40.4	6.53	6.27	5.97
NONDURABLE GOODS	191.07	184.16	174.31	38.6	39.1	41.8	4.95	4.71	4.17
GALVESTON									
MANUFACTURING	426.61	422.82	388.33	43.8	43.5	43.1	9.74	9.72	9.01
DURABLE GOODS	376.87	375.22	331.52	44.6	44.3	41.7	8.45	8.47	7.95
NONDURABLE GOODS	453.10	448.24	417.93	43.4	43.1	43.9	10.44	10.40	9.52
HOUSTON									
MANUFACTURING	347.33	344.00	323.35	43.8	43.6	44.6	7.93	7.89	7.25
DURABLE GOODS	325.60	324.56	305.86	44.0	43.8	44.2	7.40	7.41	6.92
NONDURABLE GOODS	383.24	376.26	350.88	43.6	43.1	45.1	8.79	8.73	7.78
LUBBOCK									
MANUFACTURING	206.91	205.92	186.64	41.3	41.6	41.2	5.01	4.95	4.53
DURABLE GOODS	198.40	196.58	177.72	40.0	40.2	40.3	4.96	4.89	4.41
NONDURABLE GOODS	230.23	231.14	211.95	44.8	45.5	43.7	5.14	5.08	4.85
SAN ANTONIO									
MANUFACTURING	200.00	198.70	181.94	40.9	40.8	39.9	4.89	4.87	4.56
DURABLE GOODS	209.08	209.33	180.50	41.9	41.7	40.2	4.99	5.02	4.49
NONDURABLE GOODS	190.72	188.40	182.95	39.9	40.0	39.6	4.78	4.71	4.62
WACO									
MANUFACTURING	237.72	235.01	214.77	41.2	40.8	40.6	5.77	5.76	5.29
DURABLE GOODS	248.63	243.34	212.66	42.5	42.1	40.2	5.85	5.78	5.29
NONDURABLE GOODS	224.93	224.62	215.95	39.6	39.2	40.9	5.68	5.73	5.28
WICHITA FALLS									
MANUFACTURING	243.32	236.40	222.77	39.5	39.4	40.8	6.16	6.00	5.46
DURABLE GOODS	261.30	253.29	232.15	40.2	39.7	40.8	6.50	6.38	5.69
NONDURABLE GOODS	186.00	183.26	197.06	37.5	38.5	40.8	4.96	4.76	4.83

*Figures cover Production Workers in Manufacturing and Mining industries only and Nonsupervisory Employees in other industry divisions. Earnings' averages include premium pay for overtime, holidays, and for late-shift work. †Preliminary—subject to revisions upon receipt of additional reports. **Data for prior years not comparable to current series.

NONAGRICULTURAL WAGE AND SALARY† ESTIMATES—TEXAS

INDUSTRY	NOV* 1979	OCT** 1979	NOV** 1978	CHANGE FROM OCT 1979	CHANGE FROM NOV 1978
‡TOTAL NONAGRICULTURAL EMPLOYMENT	5,617,300	5,594,100	5,369,600	23,200	247,700
MANUFACTURING	1,011,600	1,007,300	976,100	4,300	35,500
DURABLE GOODS	585,800	582,700	558,700	3,100	27,100
LUMBER & WOOD PRODUCTS	39,900	39,700	39,300	200	600
LOGGING CAMPS, SAWMILLS, PLANING MILLS	9,200	9,200	8,900	0	300
FURNITURE & FIXTURES	16,000	16,100	18,300	— 100	—2,300
STONE, CLAY & GLASS PRODUCTS	44,400	44,400	42,800	0	1,600
CONCRETE, GYPSUM & PLASTER PRODUCTS	18,700	18,600	18,000	100	700
PRIMARY METAL INDUSTRIES	44,200	44,000	43,200	200	1,000
FABRICATED METAL PRODUCTS	88,100	88,100	87,700	0	400
FABRICATED STRUCTURAL METAL PRODUCTS	45,200	45,200	45,700	0	— 500
MACHINERY, EXCEPT ELECTRICAL	140,500	139,400	136,000	1,100	4,500
OIL FIELD MACHINERY	56,600	55,900	53,800	700	2,800
ELECTRIC & ELECTRONIC EQUIPMENT	104,600	103,600	90,900	1,000	13,700
TRANSPORTATION EQUIPMENT	76,800	76,700	70,800	100	6,000
AIRCRAFT & PARTS	45,600	45,300	40,300	300	5,300
INSTRUMENTS & RELATED PRODUCTS	18,400	18,200	17,700	200	700
MISCELLANEOUS MANUFACTURING INDUSTRIES	12,900	12,500	12,000	400	900
NONDURABLE GOODS	425,800	424,600	417,400	1,200	8,400
FOOD AND KINDRED PRODUCTS	99,000	99,000	98,300	0	700
MEAT PRODUCTS	27,100	26,600	26,100	500	1,000
DAIRY PRODUCTS	5,200	5,200	5,200	0	0
BAKERY PRODUCTS	10,600	10,500	10,800	100	— 100
MALT BEVERAGES	3,400	3,400	3,200	0	200
TEXTILE MILL PRODUCTS	6,300	6,200	6,300	100	0
APPAREL & OTHER FINISHED TEXTILE PRODUCTS	71,900	71,600	72,900	300	—1,000
PAPER & ALLIED PRODUCTS	21,800	21,800	21,700	0	100
PRINTING & PUBLISHING	59,700	59,100	56,200	600	3,500
NEWSPAPER, PERIODICALS, BOOKS & MISC. PUBL.	32,700	32,000	30,000	700	2,700
CHEMICALS & ALLIED PRODUCTS	81,400	81,100	78,900	300	2,500
PETROLEUM & COAL PRODUCTS	43,700	43,700	42,900	0	800
PETROLEUM REFINING	40,200	40,200	39,400	0	800
LEATHER & LEATHER PRODUCTS	8,000	7,800	8,000	200	0
OTHER NONDURABLE GOODS	34,000	34,300	32,200	— 300	1,800
TOTAL NONMANUFACTURING	4,605,700	4,586,800	4,393,500	18,900	212,200
MINING	200,700	199,200	185,500	1,500	15,200
OIL & GAS EXTRACTION	191,600	190,200	177,000	1,400	14,600
OTHER MINING & QUARRYING	9,100	9,000	8,500	100	600
CONSTRUCTION	410,300	411,200	391,200	— 900	19,100
TRANSPORTATION & PUBLIC UTILITIES	354,700	354,400	340,700	300	14,000
RAILROAD TRANSPORTATION	31,900	32,000	30,800	— 100	1,100
TRANSPORTATION, EXCEPT RAILROADS	176,800	176,900	170,300	— 100	6,500
TRANSPORTATION BY AIR	34,300	34,200	30,800	100	3,500
COMMUNICATION	78,800	78,700	77,100	100	1,700
ELECTRIC, GAS & SANITARY SERVICES	67,200	66,800	62,500	400	4,700
ELECTRIC SERVICES	36,300	35,900	32,900	400	3,400
GAS PRODUCTION & DISTRIBUTION	26,800	26,800	25,800	0	1,000
WHOLESALE & RETAIL TRADE	1,355,400	1,345,500	1,310,600	9,900	44,800
WHOLESALE TRADE	391,500	391,000	377,200	500	14,300
RETAIL TRADE	963,900	954,500	933,400	9,400	30,500
BUILDING MATERIALS & GARDEN SUPPLIES	44,700	44,400	42,800	300	1,900
GENERAL MERCHANDISE STORES	138,700	135,600	137,400	3,100	1,300
FOOD STORES	158,400	157,100	149,600	1,300	8,800
AUTOMOTIVE DEALERS & SERVICE STATIONS	122,000	122,900	124,400	— 900	—2,400
APPAREL & ACCESSORY STORES	73,700	70,900	70,500	2,800	3,200
OTHER RETAIL TRADE	426,400	423,600	408,700	2,800	17,700
FINANCE, INSURANCE & REAL ESTATE	315,100	314,200	301,400	900	13,700
BANKING	84,500	83,800	78,700	700	5,300
INSURANCE CARRIERS, AGENTS & BROKERS	107,300	107,100	106,100	200	1,200
OTHER FINANCE, INSURANCE & REAL ESTATE	123,300	123,300	116,600	0	6,700
SERVICES	947,700	945,300	902,100	2,400	45,600
HOTELS & OTHER LODGING PLACES	55,200	55,700	54,300	— 500	900
PERSONAL SERVICES	67,300	66,700	62,400	600	4,900
BUSINESS & REPAIR SERVICES	240,600	238,300	223,700	2,300	16,900
AMUSEMENT, INCLUDING MOTION PICTURES	39,500	39,900	37,400	— 400	2,100
HEALTH SERVICES	249,700	249,800	244,900	— 100	4,800
EDUCATIONAL SERVICES	50,600	50,800	49,500	— 200	1,100
OTHER SERVICES & MISCELLANEOUS	244,800	244,100	229,900	700	14,900
TOTAL GOVERNMENT	1,021,800	1,017,900	962,000	4,800	59,800
TOTAL FEDERAL GOVERNMENT	158,300	158,500	159,000	— 200	— 700
TOTAL STATE GOVERNMENT	209,000	207,000	205,800	2,000	3,200
TOTAL LOCAL GOVERNMENT	654,500	651,500	597,200	3,000	57,300
TOTAL MANUFACTURING PRODUCTION WORKERS	693,000	691,000	676,200	2,000	16,800
DURABLE GOODS	396,400	394,800	382,500	1,600	13,900
NONDURABLE GOODS	296,600	296,200	293,700	400	2,900

†Estimated number of nonagricultural jobs in Texas without reference to place of residence of workers. ‡Estimates of TEC in cooperation with Bureau of Labor Statistics and Employment and Training Administration, U.S. Department of Labor. *Preliminary—subject to revision. **Revised.

GAINS POSTED IN INSURED UNEMPLOYMENT

Statewide insured unemployment under the regular program advanced 8.0 percent from October to November. The total number of insured unemployed in October was 48,474, compared to 52,365 in November. The insured unemployment rate for Texas was 1.1 percent for November, up from 0.9 percent the previous month and identical to the year-ago mark of 1.1 percent. Among the occupational groups in which the insured unemployed last worked, farm, fisheries, and miscellaneous was up 38.7 percent and accounted for nearly a quarter of the total number of insured unemployed in the State. The return of many migrant farmworkers for the winter was primarily responsible for this upswing in unemployment.

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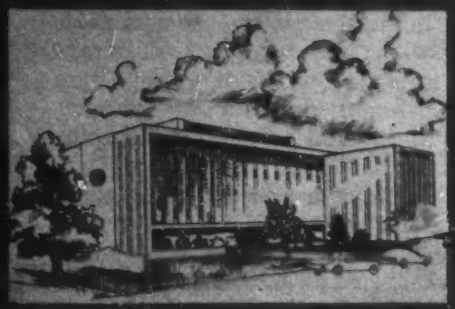

TEXAS LABOR MARKET REVIEW

T.E.C. BUILDING JANUARY 1980 AUSTIN, TEXAS 78778

EMPLOYMENT REBOUNDS IN DECEMBER

Total employment in Texas bounced back from a decline of 25,000 the previous month to post a substantial gain of over 33,000 for the period from mid-November to mid-December. The Christmas shopping season was primarily responsible for the advance as merchants hired seasonal workers to handle the holiday traffic in their stores.

While many who were seeking seasonal work were able to find jobs, thousands of others were not as fortunate. Most who sought temporary work for the holiday season were eventually able to locate a position, but others who began the search a month ago and could not find a job, simply dropped out of the labor force. This combination of those who found work and those who left the labor force led to a decline of over 45,000 in the State's total unemployment and an associated drop of 12,000 in the civilian labor force.

All of this movement within the labor force resulted in increased employment for the State, a loss in total unemployment, and a considerable drop in the unemployment rate for Texas. The actual unemployment rate for December was 3.6 percent, the lowest monthly rate the State has experienced since May of 1974. The actual unemployment rate for November was 4.3 percent and the year-ago rate was 4.7 percent. The National unemployment rate was 5.6 percent, marking the third consecutive month it has been at that level. The seasonally adjusted rate for December was 3.9 percent for Texas and 5.9 percent for the United States.

Unemployment declined among almost all of the major labor market areas in the State. Only two areas reported higher unemployment levels in December as compared to the previous month, and all were below the year-ago totals. Ten of the 25 major labor market areas had unemployment rates of 3.0 percent or less.

RETAIL TRADE PACES WAGE AND SALARY

A large gain realized in the retail trade sector led to an over-the-month advance in total nonagricultural wage and salary employment. The increase in retail was of sufficient size to overcome some moderate losses among other segments in the nonmanufacturing division and to offset a decline recorded in the manufacturing division of wage and salary employment.

All of the retail trade segment showed improvement. General merchandise stores experienced the most

SUMMARY OF LABOR FORCE† ESTIMATES

	TOTAL EMPLOYMENT‡			TOTAL UNEMPLOYMENT			UNEMPLOYED AS % OF LABOR FORCE		
	DEC* 1979	NOV** 1979	DEC** 1978	DEC* 1979	NOV** 1979	DEC** 1978	DEC* 1979	NOV** 1979	DEC** 1978
STATEWIDE	9,036,500	6,002,900	5,812,100	223,100	268,700	283,600	3.6	4.3	4.7
ABILENE	65,680	65,240	63,050	1,450	2,000	2,120	2.2	3.0	3.3
AMARILLO	86,960	86,370	82,800	2,300	2,870	3,470	2.6	3.2	4.0
AUSTIN	242,200	242,750	231,800	6,300	7,750	7,950	2.5	3.1	3.3
BEAUMONT-PORT ARTHUR-ORANGE	155,550	154,900	155,300	7,200	8,900	11,100	4.4	5.4	6.7
BROWNSVILLE-HARLINGEN-SAN BENITO	65,010	64,280	65,180	5,470	7,000	7,610	7.8	9.8	10.5
BRYAN-COLLEGE STATION	37,810	37,980	36,100	630	910	1,350	1.6	2.3	3.6
CORPUS CHRISTI	126,600	127,100	124,500	5,500	7,300	6,900	4.2	5.4	5.3
DALLAS-FORT WORTH	1,467,000	1,453,000	1,376,900	52,100	49,900	52,500	3.4	3.3	3.7
EL PASO	160,850	160,100	155,150	11,050	14,200	15,050	6.4	8.1	8.8
GALVESTON-TEXAS CITY	78,700	77,640	78,170	3,070	3,910	5,520	3.8	4.8	6.6
HOUSTON	1,378,800	1,374,600	1,321,100	35,800	47,200	49,500	2.5	3.3	3.6
KILLEEN-TEMPLE	60,550	60,430	59,480	2,540	3,290	3,220	4.0	5.2	5.1
LAREDO	28,710	28,450	26,520	2,970	3,890	4,660	9.4	12.0	14.9
LONGVIEW—MARSHALL	62,290	61,770	60,270	2,880	3,700	3,670	4.4	5.7	5.7
LUBBOCK	102,490	100,670	101,280	2,560	3,170	4,140	2.4	3.1	3.9
MCALLEN-PHARR-EDINBURG	81,540	81,050	78,190	10,210	13,240	11,430	11.1	14.0	12.8
MIDLAND	45,660	44,870	43,050	1,000	1,390	1,520	2.1	3.0	3.4
ODESSA	61,210	60,440	57,700	1,510	2,040	2,770	2.4	3.3	4.6
SAN ANGELO	42,260	41,880	39,830	1,540	1,250	1,600	3.5	2.9	3.9
SAN ANTONIO	395,450	392,500	383,400	17,550	23,350	24,900	4.2	5.6	6.1
SHERMAN-DENISON	38,230	38,080	36,550	1,520	1,910	2,200	3.8	4.8	5.7
TEXARKANA	44,890	45,110	43,640	3,460	4,840	3,970	7.2	9.7	8.3
TYLER	61,690	61,470	59,190	2,590	3,020	2,810	4.0	4.7	4.5
WACO	76,710	76,450	73,600	2,360	2,990	3,270	3.0	3.8	4.3
WICHITA FALLS	58,880	58,490	57,370	1,480	1,960	2,340	2.5	3.2	3.9

†Sum of estimated number of total employed and unemployed workers residing in the specified areas.
‡Includes resident wage and salary workers, self-employed, unpaid family workers and domestics in private households, agricultural workers and workers involved in labor-management disputes.
*Preliminary—subject to revision. **Revised.

TEXAS LABOR MARKET REVIEW
Official Publication of
TEXAS EMPLOYMENT COMMISSION
NOLAN F. WARD ..... Chairman
KEN CLAPP ..... Commissioner
A.C. SHIRLEY ..... Commissioner
ERNIE W. TULLIS, Administrator

Published Monthly at the TEC Building, Austin, Texas
Economic Research and Analysis Department

substantial increase, although apparel and accessory stores and other retail trade also had notable advances. All of these upswings were attributed to staffing patterns in regard to the Christmas shopping season. Less substantial gains were posted in food stores, automotive dealers, and service stations, and building materials and garden supplies. These rises were also due to the seasonal shopping trends. Food stores sales of traditional holiday foods, increased hours of operation by service stations to accommodate holiday travelers, and the sale of Christmas trees led to gains in the respective industries.

The manufacturing division as a whole decreased employment over the month as losses were evident in both the durable and nondurable goods sectors. Among the industries in durable goods which showed declines, lumber and wood products was hardest hit. Curtailed construction activity, short supplies, and, in some cases, inclement weather which affected both operations and supplies led to the downturn. Losses were noted in other industries which are related to construction. Stone, clay, and glass products and primary metal industries both suffered small drops in employment, while furniture and fixtures and fabricated metal products demonstrated no growth over the month.

The durable goods sector was not entirely without good news, however, as the transportation equipment industry managed to record a moderate upturn. The largest portion of this gain occurred in the aircraft and parts sector of transportation equipment.

Within the nondurable goods sector, the losses and gains were, for the most part, evenly split. The only notable shift occurred in food and kindred products where a sizeable decrease was reported. The decline was the result of unfavorable weather conditions which temporarily affected the flow of food crops from the fields to the processing plants. Elsewhere in the sector, apparel and other finished textile products posted a small rise as employment gains were realized in men's and boys' suits, coats, and furnishings. Printing and publishing also inched upward as seasonal production in the newspaper, periodicals, books, and miscellaneous publishing segment was on the upswing.

The largest change in total nonmanufacturing was, of course, in retail trade. Increases were noted, however, in other segments as well as in trade. Mining was up moderately as the majority of firms in the oil and gas extraction portion of the industry reported nominal increases in response to consumer demand. Transportation and public utilities realized a seasonal advance in farm product warehousing and storage and a business upturn in marine cargo handling. These two segments of transportation, except railroads, directly accounted for the total increase in the transportation and public utilities sector as communications and electric, gas, and sanitary services experienced only minor fluctuations in employment. Finance, insurance, and real estate recorded gains in all segments as the industry posted a moderate gain over the month. Insurance carriers, agents, and brokers led all segments.

The largest reduction among the nonmanufacturing industries occurred in construction and was primarily due to inclement weather. General contractors and heavy construction contractors underwent significant employment decreases from a month ago. Services also showed a downward trend in employment over the month as losses were noted in business and repair services, educational services, hotels and other lodging places, and other services and miscellaneous.

State and local education were down over the month as the fall semester drew to a close and local school districts shut down for the holidays. These activities were normal for the time of the year, but still caused a significant drop in total government. State administrative agencies also showed employment declines which were attributed to a hiring freeze in various agencies during the month.

HOURS AND EARNINGS INCREASE

Average weekly earnings for an average production worker in manufacturing rose from $278.30 for November to $283.92 for December. Average weekly hours (AWH) for a production worker in Texas were 42.0 hours for December, 41.6 hours for November, and 42.0 hours for December 1978. Over this same period, average hourly earnings (AHE) have been $6.76, $6.69, and $6.10. Two industries, primary metals and mining, reported a rather large advance in AHE of 59 cents. Primary metals, however, had an associated rise in AWH of 3.5 hours, while mining was up only 0.5 of an hour. In both industries overtime worked at premium pay was a major factor in the advance, but a wage rate increase also went into effect in mining. Overtime was also a factor behind substantial gains in AHE and AWH in transportation equipment and instruments and related products. Both segments of printing and publishing climbed in AHE; however, the AWH for the industry were boosted by seasonal production in the newspapers, periodicals, books, and miscellaneous publishing segment.

Electric and electronic equipment realized a considerable gain in AHE, but AWH were down as less overtime was worked. The gain in AHE was attributed to the layoff of many lower-paid employees. Declines in AHE were noted in petroleum and coal products and petroleum refining due to a decrease in the amount of overtime worked. The December AHE for the petroleum and coal products industry was still at a level

HOURS AND EARNINGS IN TEXAS*

SOURCE: TEXAS EMPLOYMENT COMMISSION IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS, U.S. DEPARTMENT OF LABOR

	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	DEC† 1979	NOV 1979	DEC 1978	DEC† 1979	NOV 1979	DEC 1978	DEC† 1979	NOV 1979	DEC 1978
FOR TEXAS									
MANUFACTURING—TOTAL	$283.92	$278.30	$256.20	42.0	41.6	42.0	$6.76	$6.69	$6.10
DURABLE GOODS	292.32	282.99	257.73	42.8	42.3	42.6	6.83	6.69	6.05
LUMBER & WOOD PRODUCTS	226.53	225.94	193.58	42.5	43.2	41.1	5.33	5.23	4.71
FURNITURE & FIXTURES	175.38	185.65	166.37	38.8	39.5	38.6	4.52	4.70	4.31
STONE, CLAY & GLASS PRODS.	271.90	271.65	247.52	44.5	45.2	43.5	6.11	6.01	5.69
PRIMARY METAL INDUSTRIES	425.96	368.50	320.72	46.2	42.7	42.2	9.22	8.63	7.60
FABRICATED METAL PRODUCTS	283.48	277.02	262.88	42.5	42.1	42.4	6.67	6.58	6.20
MACHINERY, EXCEPT ELEC.	309.12	302.60	277.64	43.6	42.5	44.0	7.09	7.12	6.31
OIL FIELD MACHINERY	377.57	371.68	339.30	45.6	44.3	46.1	8.28	8.39	7.36
ELEC. & ELECTRONIC EQUIP.	247.66	247.52	231.77	40.8	41.6	43.0	6.07	5.95	5.39
TRANSPORTATION EQUIPMENT	360.78	348.12	307.70	42.0	41.1	42.5	8.59	8.47	7.24
AIRCRAFT & PARTS	378.68	381.87	349.80	42.5	43.1	44.0	8.91	8.86	7.95
INSTR. & RELATED PRODUCTS	227.90	211.64	199.59	43.0	40.7	40.9	5.30	5.20	4.88
MISC. MFG. INDUSTRIES	189.74	197.00	196.88	40.2	41.3	41.8	4.72	4.77	4.71
NONDURABLE GOODS	272.80	271.88	254.41	40.9	40.7	41.3	6.67	6.68	6.16
FOOD & KINDRED PRODUCTS	257.98	255.04	236.53	43.8	43.3	43.4	5.89	5.89	5.45
MEAT PRODUCTS	258.99	261.52	243.54	44.5	44.4	44.2	5.82	5.89	5.51
MALT BEVERAGES	489.26	494.89	416.37	46.2	46.6	42.4	10.59	10.62	9.82
TEXTILE MILL PRODUCTS	200.51	198.79	183.14	41.6	41.5	42.1	4.82	4.79	4.35
APPRL. & OTHER TEXT PROD.	145.41	144.28	128.52	37.0	36.9	35.9	3.93	3.91	3.58
PAPER & ALLIED PRODUCTS	293.15	299.33	279.07	41.7	42.1	43.2	7.03	7.11	6.46
PRINTING & PUBLISHING	249.71	241.70	231.26	39.7	39.3	39.6	6.29	6.15	5.84
CHEMICALS & ALLIED PRODS.	422.68	422.42	393.71	42.1	42.2	43.6	10.04	10.01	9.03
PETROLEUM & COAL PRODUCTS	404.01	411.93	401.51	41.1	41.4	43.5	9.83	9.95	9.23
PETROLEUM REFINING	415.54	422.09	413.33	40.9	40.9	43.1	10.16	10.32	9.59
LEATHER & LEATHER PRODUCTS	142.88	144.02	133.59	37.5	38.0	36.4	3.81	3.79	3.67
OTHER NONDURABLE GOODS	239.20	239.09	227.57	41.6	40.8	43.1	5.75	5.86	5.28
NONMANUFACTURING									
MINING	384.11	352.64	322.39	46.9	46.4	45.6	8.19	7.60	7.07
OIL & GAS EXTRACTION	387.28	354.50	325.06	47.0	46.4	45.4	8.24	7.64	7.16
OTHER MINING & QUARRYING**	316.10	309.39	INA	43.8	45.1	INA	7.08	6.86	INA
COMMUNICATIONS, EXCEPT U.S. POSTAL SERV.	317.69	316.31	289.58	40.5	40.5	40.5	7.77	7.81	7.15
ELEC., GAS & SAN. SVCS.	313.46	325.85	296.38	40.6	42.1	42.1	7.77	7.74	7.04
WHOLESALE & RETAIL TRADE	190.10	188.50	176.79	35.6	35.7	35.5	5.34	5.28	4.98
WHOLESALE TRADE	281.18	280.02	256.63	40.4	40.7	40.8	6.96	6.88	6.29
RETAIL TRADE	154.01	152.10	145.62	33.7	33.8	33.4	4.57	4.50	4.36
GENERAL MDSE. STORES	123.06	124.98	117.11	29.3	29.2	30.9	4.20	4.28	3.79
BANKING	172.21	170.33	158.30	37.6	37.6	37.6	4.58	4.53	4.21
FOR THE MAJOR MARKETS									
AMARILLO									
MANUFACTURING	270.70	269.81	248.22	42.9	43.1	42.0	6.31	6.26	5.91
DURABLE GOODS	287.30	284.43	262.86	42.5	42.2	41.2	6.76	6.74	6.38
NONDURABLE GOODS	255.74	256.67	237.44	43.2	43.8	42.4	5.92	5.86	5.60
AUSTIN									
MANUFACTURING	217.00	210.02	200.34	42.3	41.1	42.9	5.13	5.11	4.67
DURABLE GOODS	222.13	214.56	202.68	42.8	41.5	43.4	5.19	5.17	4.67
NONDURABLE GOODS	197.38	192.27	191.94	40.2	39.4	41.1	4.91	4.88	4.67
BEAUMONT									
MANUFACTURING	384.71	379.76	362.44	41.5	41.1	41.9	9.27	9.24	8.65
DURABLE GOODS	347.26	337.33	303.66	42.4	41.8	42.0	8.19	8.07	7.23
NONDURABLE GOODS	405.25	402.12	390.83	41.1	40.7	41.8	9.86	9.88	9.35
CORPUS CHRISTI									
MANUFACTURING	298.90	299.43	283.91	39.8	40.3	40.5	7.51	7.43	7.01
DURABLE GOODS	253.37	253.17	206.62	40.8	40.9	36.7	6.21	6.19	5.63
NONDURABLE GOODS	323.83	324.00	323.09	39.3	40.0	42.4	8.24	8.10	7.62
DALLAS/FT. WORTH									
MANUFACTURING	267.12	258.96	243.11	42.4	41.5	41.7	6.30	6.24	5.83
DURABLE GOODS	286.23	274.07	258.45	43.5	42.1	42.3	6.58	6.51	6.11
NONDURABLE GOODS	227.20	229.07	214.49	40.0	40.4	40.7	5.68	5.67	5.27
EL PASO									
MANUFACTURING	211.43	219.05	185.93	42.8	42.7	39.9	4.94	5.13	4.66
DURABLE GOODS	251.06	252.55	241.03	39.6	39.4	41.7	6.34	6.41	5.78
NONDURABLE GOODS	199.29	208.41	170.21	43.8	43.6	39.4	4.55	4.78	4.32
GALVESTON									
MANUFACTURING	417.38	417.78	398.79	42.2	42.2	43.3	9.89	9.90	9.21
DURABLE GOODS	356.25	361.67	356.69	40.3	40.5	44.2	8.84	8.93	8.07
NONDURABLE GOODS	448.24	446.34	418.58	43.1	43.0	42.8	10.40	10.38	9.78
HOUSTON									
MANUFACTURING	356.06	353.78	327.36	44.9	44.5	44.6	7.93	7.95	7.34
DURABLE GOODS	334.64	332.71	312.01	45.1	44.9	44.7	7.42	7.41	6.98
NONDURABLE GOODS	391.59	387.64	352.09	44.6	44.0	44.4	8.78	8.81	7.93
LUBBOCK									
MANUFACTURING	213.19	212.57	199.79	42.3	42.6	42.6	5.04	4.99	4.69
DURABLE GOODS	202.29	203.68	192.51	39.9	40.9	41.4	5.07	4.98	4.65
NONDURABLE GOODS	241.54	236.41	219.90	48.6	47.0	46.1	4.97	5.03	4.77
SAN ANTONIO									
MANUFACTURING	201.78	199.17	180.80	40.6	40.4	40.0	4.97	4.93	4.52
DURABLE GOODS	211.04	206.09	181.08	41.3	41.3	40.6	5.11	4.99	4.46
NONDURABLE GOODS	192.72	192.85	180.52	39.9	39.6	39.5	4.83	4.87	4.57
WACO									
MANUFACTURING	238.04	242.28	232.48	40.9	41.7	43.7	5.82	5.81	5.32
DURABLE GOODS	247.38	250.38	245.61	42.0	42.8	45.4	5.89	5.85	5.41
NONDURABLE GOODS	227.30	232.30	219.76	39.6	40.4	42.1	5.74	5.75	5.22
WICHITA FALLS									
MANUFACTURING	250.10	246.62	230.33	41.0	40.1	41.5	6.10	6.15	5.55
DURABLE GOODS	262.44	261.39	241.19	41.2	40.4	41.8	6.37	6.47	5.77
NONDURABLE GOODS	210.89	201.22	197.96	40.4	39.3	40.4	5.22	5.12	4.90

*Figures cover Production Workers in Manufacturing and Mining industries only and Nonsupervisory Employees in other industry divisions. Earnings' averages include premium pay for overtime, holidays, and for late-shift work. †Preliminary—subject to revisions upon receipt of additional reports. **Data for prior years not comparable to current series.

NONAGRICULTURAL WAGE AND SALARY† ESTIMATES—TEXAS

INDUSTRY	DEC* 1979	NOV** 1979	DEC** 1978	CHANGE FROM NOV 1979	CHANGE FROM DEC 1978
‡TOTAL NONAGRICULTURAL EMPLOYMENT	5,638,800	5,621,200	5,407,700	17,600	231,100
MANUFACTURING	1,009,100	1,011,100	980,000	— 2,000	29,100
DURABLE GOODS	583,900	585,100	560,200	— 1,200	23,700
LUMBER & WOOD PRODUCTS	39,000	40,000	38,800	— 1,000	200
LOGGING CAMPS, SAWMILLS, PLANING MILLS	9,000	9,200	8,900	— 200	100
FURNITURE & FIXTURES	16,000	16,000	18,200	0	— 2,200
STONE, CLAY & GLASS PRODUCTS	44,400	44,700	42,600	— 300	1,800
CONCRETE, GYPSUM & PLASTER PRODUCTS	19,000	19,000	17,800	0	1,200
PRIMARY METAL INDUSTRIES	44,300	44,400	42,900	— 100	1,400
FABRICATED METAL PRODUCTS	88,400	88,400	86,400	0	2,000
FABRICATED STRUCTURAL METAL PRODUCTS	45,300	45,300	44,600	0	700
MACHINERY, EXCEPT ELECTRICAL	140,700	140,800	136,800	— 100	3,900
OIL FIELD MACHINERY	56,600	56,500	53,800	100	2,800
ELECTRIC & ELECTRONIC EQUIPMENT	103,100	103,600	93,100	— 500	10,000
TRANSPORTATION EQUIPMENT	77,000	76,300	71,700	700	5,300
AIRCRAFT & PARTS	45,500	45,100	40,800	400	4,700
INSTRUMENTS & RELATED PRODUCTS	18,200	18,200	17,700	0	500
MISCELLANEOUS MANUFACTURING INDUSTRIES	12,800	12,700	12,000	100	800
NONDURABLE GOODS	425,200	426,000	419,800	— 800	5,400
FOOD AND KINDRED PRODUCTS	97,600	99,000	99,900	— 1,400	— 2,300
MEAT PRODUCTS	26,800	27,100	26,700	— 300	100
DAIRY PRODUCTS	5,200	5,100	5,200	100	0
BAKERY PRODUCTS	10,400	10,600	10,800	— 200	— 400
MALT BEVERAGES	3,400	3,400	3,200	0	200
TEXTILE MILL PRODUCTS	6,200	6,200	6,300	0	— 100
APPAREL & OTHER FINISHED TEXTILE PRODUCTS	72,400	71,900	72,700	500	— 300
PAPER & ALLIED PRODUCTS	21,900	21,900	21,800	0	100
PRINTING & PUBLISHING	60,300	60,000	57,000	300	3,300
NEWSPAPER, PERIODICALS, BOOKS & MISC. PUBL	33,100	32,900	30,700	200	2,400
CHEMICALS & ALLIED PRODUCTS	81,400	81,300	78,900	100	2,500
PETROLEUM & COAL PRODUCTS	43,600	43,700	42,900	— 100	700
PETROLEUM REFINING	40,200	40,200	39,300	0	900
LEATHER & LEATHER PRODUCTS	8,000	8,000	8,000	0	0
OTHER NONDURABLE GOODS	33,800	34,000	32,300	— 200	1,500
TOTAL NONMANUFACTURING	4,629,700	4,610,100	4,427,700	19,600	202,000
MINING	202,100	200,000	185,500	2,100	16,600
OIL & GAS EXTRACTION	193,100	191,000	177,100	2,100	16,000
OTHER MINING & QUARRYING	9,000	9,000	8,400	0	600
CONSTRUCTION	404,900	410,400	387,800	— 5,500	17,100
TRANSPORTATION & PUBLIC UTILITIES	357,700	355,700	342,100	2,000	15,600
RAILROAD TRANSPORTATION	32,200	32,200	31,000	0	1,200
TRANSPORTATION, EXCEPT RAILROADS	179,500	177,500	171,000	2,000	8,500
TRANSPORTATION BY AIR	34,600	34,600	30,900	0	3,700
COMMUNICATION	78,900	78,800	77,200	100	1,700
ELECTRIC, GAS & SANITARY SERVICES	67,100	67,200	62,900	— 100	4,200
ELECTRIC SERVICES	36,100	36,200	33,100	— 100	3,000
GAS PRODUCTION & DISTRIBUTION	26,800	26,800	26,000	0	800
WHOLESALE & RETAIL TRADE	1,384,800	1,359,900	1,342,000	24,900	42,800
WHOLESALE TRADE	392,000	391,400	378,500	600	13,500
RETAIL TRADE	992,300	968,500	963,500	24,300	29,300
BUILDING MATERIALS & GARDEN SUPPLIES	45,000	44,800	43,300	200	1,700
GENERAL MERCHANDISE STORES	151,300	140,700	151,400	10,600	— 100
FOOD STORES	160,900	159,800	150,600	1,100	10,300
AUTOMOTIVE DEALERS & SERVICE STATIONS	122,300	122,000	124,600	300	— 2,300
APPAREL & ACCESSORY STORES	81,100	74,000	77,800	7,100	3,300
OTHER RETAIL TRADE	432,200	427,200	415,800	5,000	16,400
FINANCE, INSURANCE & REAL ESTATE	316,500	314,800	301,900	1,700	14,600
BANKING	84,900	84,500	79,000	400	5,900
INSURANCE CARRIERS, AGENTS & BROKERS	108,000	107,300	106,600	700	1,400
OTHER FINANCE, INSURANCE & REAL ESTATE	123,600	123,000	116,300	600	7,300
SERVICES	945,600	947,300	904,500	— 1,700	41,100
HOTELS & OTHER LODGING PLACES	54,300	54,900	53,600	— 600	700
PERSONAL SERVICES	67,500	67,500	63,300	0	4,200
BUSINESS & REPAIR SERVICES	239,000	240,200	226,700	— 1,200	12,300
AMUSEMENT, INCLUDING MOTION PICTURES	39,500	38,900	36,000	600	3,500
HEALTH SERVICES	250,100	249,600	244,700	500	5,400
EDUCATIONAL SERVICES	50,200	50,800	49,400	— 600	800
OTHER SERVICES & MISCELLANEOUS	245,000	245,400	230,800	— 400	14,200
TOTAL GOVERNMENT	1,018,100	1,022,000	963,900	— 3,900	54,200
TOTAL FEDERAL GOVERNMENT	158,100	158,200	159,100	— 100	— 1,000
TOTAL STATE GOVERNMENT	206,100	208,900	205,900	— 2,800	200
TOTAL LOCAL GOVERNMENT	653,900	654,900	598,900	— 1,000	55,000
TOTAL MANUFACTURING PRODUCTION WORKERS	692,500	693,400	678,300	— 900	14,200
DURABLE GOODS	395,600	396,000	382,800	— 400	12,800
NONDURABLE GOODS	296,900	297,400	295,500	— 500	1,400

†Estimated number of nonagricultural jobs in Texas without reference to place of residence of workers. ‡Estimates of TEC in cooperation with Bureau of Labor Statistics and Employment and Training Administration, U.S. Department of Labor. *Preliminary—subject to revision. **Revised.

some 60 cents above the year-ago average. Oil field machinery experienced a rise in AWH and a drop in AHE due to the hiring of entry-level employees at a lower pay rate than the industry average. Paper and allied products recorded losses in both AWH and AHE as a slowdown occurred in the amount of overtime being worked at premium pay.

ADVANCES SEEN IN INSURED UNEMPLOYMENT

December marked the third consecutive month that insured unemployment under the regular program has risen. The number of insured unemployed in the State increased 7.8 percent from 52,365 at mid-November to 56,451 at mid-December. The insured unemployment rate for Texas was 1.2 percent for December, compared to 1.1 percent for November and 1.4 percent for December 1978. The National insured unemployment rate was 3.3 percent for December, 2.6 percent a month ago, and 3.2 percent a year ago.

FARM EMPLOYMENT DROP REPORTED

A decrease of 2,600 was noted in total agricultural employment from mid-November to mid-December. Farm employment totaled 177,100 a month ago and was at a level of 174,500 during December. Seasonal farm employment was 46,200 in December, compared to 55,500 for a year ago.

The cotton harvest was ahead of schedule and seasonal employment in cotton activities was up from 2,100 for December 1978 to 12,400 for December 1979. Seasonal employment in vegetable activities was 6,500, below the year-ago mark of 7,100. The decline was due primarily to heavy rains in the Lower Rio Grande Valley which delayed the harvest of fall vegetables. Employment in feed and grain activities also dropped over the year from 7,700 to 5,900, wheat and barley planting was nearly completed and recent rains were expected to benefit small grains.

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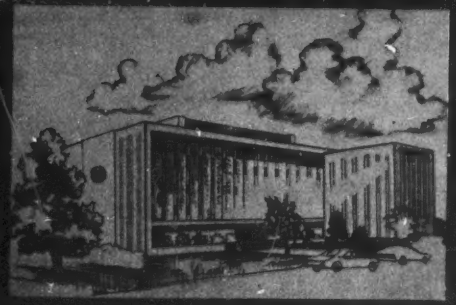


TEXAS LABOR MARKET REVIEW

T.E.C. BUILDING FEBRUARY 1980 AUSTIN, TEXAS 78778

LABOR FORCE ESTIMATES REVISED

The labor force, total employment, nonagricultural jobs, and unemployment statistics appearing in this issue have been revised and are not comparable with prior estimates. These current estimates, utilizing the most recent data available, reflect a refinement of previously published estimates. Tabulations of revised data for appropriate prior periods may be obtained by addressing an inquiry to the Texas Employment Commission, Economic Research and Analysis Department, TEC Building, Austin, Texas 78778.

STATEWIDE EMPLOYMENT DROPS SHARPLY

A substantial loss occurred from mid-December to mid-January in Statewide total employment. The largest part of the decline was attributed to staff reductions which took place in retail trade, although lesser decreases were noted in other segments of employment. While employment dwindled, total unemployment climbed to 327,300 at mid-January, an increase of over 100,000 from the previous month. The large advance in unemployment and the associated drop in employment resulted in a moderate increase in the State's civilian labor force. The January labor force was 6,345,400 and was 18,100 above the December labor force of 6,327,300.

DECLINES SEEN IN WAGE AND SALARY

Total nonagricultural wage and salary employment plunged from December to January with losses evident in manufacturing and nonmanufacturing divisions. The decrease in trade alone, however, was sufficient to turn total wage and salary employment downward. Every segment of trade posted a decline, the largest of which were reported in the general merchandise stores and apparel and accessory stores portions of retail trade. The losses in trade were the result of stores trimming their payrolls following the holiday shopping season.

All of the decrease in manufacturing occurred in the durable goods sector. Over 90 percent of the drop in durable goods was centered in only two segments, electric and electronic equipment and transportation equipment. A labor-management dispute contributed to the reduction in electric and electronic equipment, while the loss in transportation equipment was attrib-

SUMMARY OF LABOR FORCE† ESTIMATES

	TOTAL EMPLOYMENT‡			TOTAL UNEMPLOYMENT			UNEMPLOYED AS % OF LABOR FORCE		
	JAN* 1980	DEC** 1979	JAN** 1979	JAN* 1980	DEC** 1979	JAN** 1979	JAN* 1980	DEC** 1979	JAN** 1979
STATEWIDE	6,018,200	6,101,800	5,855,800	327,200	225,500	270,900	5.2	3.6	4.4
ABILENE	64,000	65,140	82,430	2,360	1,400	2,110	3.6	2.1	3.3
AMARILLO	85,730	87,830	83,100	3,450	2,290	3,480	3.9	2.5	4.0
AUSTIN	240,450	243,250	231,200	9,600	6,400	7,300	3.8	2.6	3.1
BEAUMONT-PORT ARTHUR-ORANGE	149,900	155,750	152,300	11,800	7,250	10,600	7.3	4.4	6.5
BROWNSVILLE-HARLINGEN-SAN BENITO	66,290	66,540	65,730	7,970	5,510	6,270	10.7	7.6	8.7
BRYAN-COLLEGE STATION	39,930	39,370	35,620	1,360	660	1,140	3.3	1.6	3.1
CORPUS CHRISTI	134,300	134,750	129,250	8,750	5,700	6,250	6.1	4.1	4.6
DALLAS-FORT WORTH	1,445,400	1,468,900	1,411,700	63,100	52,200	54,600	4.2	3.4	3.7
EL PASO	156,200	159,000	153,750	15,700	11,000	12,850	9.1	6.5	7.7
GALVESTON-TEXAS CITY	76,020	77,540	74,590	5,320	3,090	4,350	6.5	3.8	5.5
HOUSTON	1,398,500	1,409,700	1,339,700	61,300	37,700	47,600	4.2	2.6	3.4
KILLEEN-TEMPLE	61,040	61,340	58,820	4,040	2,540	2,910	6.2	4.0	4.7
LAREDO	29,890	30,150	27,870	4,450	3,000	3,980	13.0	9.0	12.5
LONGVIEW—MARSHALL	63,510	64,290	61,880	4,170	2,890	3,300	6.2	4.3	5.1
LUBBOCK	98,360	100,970	95,440	4,250	2,830	3,500	4.1	2.5	3.5
MCALLEN-PHARR-EDINBURG	80,940	80,960	75,390	13,050	10,110	10,450	13.9	11.1	12.2
MIDLAND	45,130	45,130	42,780	2,060	1,060	1,650	4.4	2.3	3.7
ODESSA	59,240	59,540	55,900	2,480	1,500	2,280	4.0	2.5	3.9
SAN ANGELO	41,570	42,210	39,060	1,670	1,170	1,430	3.9	2.7	3.5
SAN ANTONIO	391,800	396,200	378,700	26,500	17,650	22,100	6.3	4.3	5.5
SHERMAN-DENISON	38,360	38,580	36,880	2,350	1,530	1,920	5.8	3.8	4.9
TEXARKANA	43,790	45,210	43,770	4,400	3,330	3,560	9.1	6.9	7.5
TYLER	61,900	62,570	60,750	3,350	2,600	2,960	5.1	4.0	4.6
WACO	75,410	76,810	73,240	3,820	2,380	3,150	4.8	3.0	4.1
WICHITA FALLS	57,970	58,560	56,520	2,200	1,460	2,140	3.7	2.4	3.6

†Sum of estimated number of total employed and unemployed workers residing in the specified areas

‡Includes resident wage and salary workers, self-employed, unpaid family workers and domestics in private households, agricultural workers and workers involved in labor-management disputes

*Preliminary—subject to revision **Revised

TEXAS LABOR MARKET REVIEW
Official Publication of
TEXAS EMPLOYMENT COMMISSION
NOLAN F. WARD ..... Chairman
KEN CLAPP ..... Commissioner
A.C. SHIRLEY ..... Commissioner
ERNIE W. TULLIS, Administrator

Published Monthly at the TEC Building, Austin, Texas
Economic Research and Analysis Department

uted to motor vehicles and motor vehicle equipment. The aircraft and parts segment of transportation equipment, however, did manage to post a slight advance as did a few other industries. The largest gain in all of durable goods was realized by fabricated metal products and it was a modest advance. The oil field machinery portion of nonelectric machinery led the industry to a small gain as consumer demand remained high for petroleum products.

Nondurable goods was unchanged over the month as several minor fluctuations were apparent throughout the industry, but no definite trend was established. Food and kindred products showed the largest increase, but even its gain was no more than a moderate rise. Apparel and other finished textile products suffered the most significant decline as it dropped mildly. The bulk of the decrease occurred in women's and misses' outerwear and women's and children's undergarments.

Nonmanufacturing was down substantially due to the decreases reported in trade. Other segments of the division, however, fared much better than trade. Mining rose considerably due to a large gain in oil and gas extraction. The rise in oil and gas extraction was attributed to the same reason as the rise in the oil field machinery segment of manufacturing, continued demand for petroleum and petroleum products. Construction also moved upward as employment fluctuated within the industry, but overall increased considerably over the month. Favorable weather conditions this winter have done much to increase employment in construction. A continued high level of activity in spite of rising interest rates has also contributed to gains within the industry.

Transportation and public utilities declined slightly as losses were reported in the transportation industries. Trucking and warehousing and water transportation suffered the most significant drops in the transportation, except railroads, segment. The losses can be attributed to the reduction in the flow of packages and merchandise which follows the busy holiday season. Communication and electric, gas, and sanitary services managed to record moderate upswings from December to January. Finance, insurance and real estate climbed modestly with the largest gain recorded in the other finance, insurance and real estate segment. Banking was the only segment to report a loss, although the decline was only nominal.

Employment reductions were experienced in most segments of services, but gains in business and repair services and health services offset many of the decreases. Educational services was down as many educational institutions had not yet started the spring term. Government increased on the strength of a considerable gain in local government. Local educational and administrative agencies grew as they filled many long-standing vacancies as well as openings created by year-end terminations and retirements. State government employment was down due to the semester break at state colleges and universities.

HOURS AND EARNINGS SHOW LOSS

Average weekly earnings for a production worker in Texas declined from $282.41 in December to $273.50 for January. The loss was the result of a decline in average weekly hours (AWH) and in average hourly earnings (AHE). The January estimate of average weekly earnings was, however, well above the year-ago figure of $255.63. Almost all reporting industries suffered slight to moderate declines in either hours or hourly earnings over the month as production activity tapered off following the busy holiday season. A loss of overtime and holiday pay was generally responsible for the decline in AHE. A few industries were able to post gains in AWH and AHE over the month. Chief among these industries were apparel and other textile products, miscellaneous manufacturing industries, and the aircraft and parts segment of transportation equipment. Wage rate increases were experienced in all of these industries, which helped to boost AHE. Industries which substained losses in both AWH and AHE included oil field machinery, printing and publishing, and malt beverages. A reduction in the amount of overtime was behind the losses in oil field machinery and malt beverages, while increased hiring of entry-level workers affected hours and earnings in printing and publishing.

INSURED UNEMPLOYMENT CLIMBS

An over-the-month advance of 7.4 percent was registered in statewide insured unemployment under the regular program. This marked the fourth consecutive month that insured unemployment has increased and the third consecutive month that the increase has been over seven percent. Insured unemployment was 60,632 for January, compared to 56,451 for December and 54,041 for January 1979. The insured unemployment rate for the State was 1.5 percent for January, 1.2 percent for December, and 1.5 percent for January 1979. Nationally, the insured unemployment rate was 4.1 percent, compared to 3.2 percent a month ago, and 3.9 percent a year ago.

INCREASE SEEN IN UNEMPLOYMENT

The January unemployment rate was 5.2 percent, significantly above the December rate of only 3.6 percent. The January rate was also well above the year-ago rate of 4.4 percent. The National unemployment rate was 6.8 percent for January, compared to 5.6 percent one month ago and 6.4 percent a year ago.

HOURS AND EARNINGS IN TEXAS*

SOURCE: TEXAS EMPLOYMENT COMMISSION IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS, U.S. DEPARTMENT OF LABOR

	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	JAN† 1980	DEC 1979	JAN 1979	JAN† 1980	DEC 1979	JAN 1979	JAN† 1980	DEC 1979	JAN 1979
FOR TEXAS									
MANUFACTURING—TOTAL	273.50	282.41	255.63	40.7	41.9	40.9	6.72	6.74	6.25
DURABLE GOODS	280.38	286.27	255.85	41.6	42.6	41.2	6.74	6.72	6.21
LUMBER & WOOD PRODUCTS	197.25	205.88	191.18	38.6	39.9	39.5	5.11	5.16	4.84
FURNITURE & FIXTURES	177.24	180.37	170.71	40.1	40.9	39.7	4.42	4.41	4.30
STONE, CLAY & GLASS PRODS.	259.98	264.45	235.31	42.0	43.0	41.5	6.19	6.15	5.67
PRIMARY METAL INDUSTRIES	353.46	354.89	326.76	41.1	41.9	42.0	8.60	8.47	7.78
FABRICATED METAL PRODUCTS	295.68	298.05	263.96	42.0	42.7	41.7	7.04	6.98	6.33
MACHINERY, EXCEPT ELEC.	298.68	309.02	270.22	43.1	44.4	41.7	6.93	6.96	6.48
OIL FIELD MACHINERY	352.68	370.18	330.41	44.7	46.1	45.2	7.89	8.03	7.31
ELEC. & ELECTRONIC EQUIP.	247.52	251.43	214.12	41.6	42.4	39.8	5.95	5.93	5.38
TRANSPORTATION EQUIPMENT	330.48	342.32	317.58	40.8	41.9	42.8	8.10	8.17	7.42
AIRCRAFT & PARTS	381.46	371.94	356.69	43.2	42.9	44.2	8.83	8.67	8.07
INSTR. & RELATED PRODUCTS	219.60	230.37	198.68	40.0	42.9	40.3	5.49	5.37	4.93
MISC. MFG. INDUSTRIES	195.84	181.37	182.98	40.8	39.6	38.2	4.80	4.58	4.79
NONDURABLE GOODS	264.92	277.16	254.52	39.6	41.0	40.4	6.69	6.76	6.30
FOOD & KINDRED PRODUCTS	257.90	260.40	235.61	43.2	42.9	41.7	5.97	6.07	5.65
MEAT PRODUCTS	259.19	250.80	238.71	42.7	41.8	41.3	6.07	6.00	5.78
MALT BEVERAGES	466.37	495.61	418.32	44.8	46.8	42.0	10.41	10.59	9.96
TEXTILE MILL PRODUCTS	200.93	201.54	185.06	41.6	41.9	41.4	4.83	4.81	4.47
APPRL. & OTHER TEXT PROD.	151.40	144.69	131.35	37.2	37.1	35.5	4.07	3.90	3.70
PAPER & ALLIED PRODUCTS	300.88	302.87	284.48	41.5	42.3	43.3	7.25	7.16	6.57
PRINTING & PUBLISHING	239.62	248.92	216.59	38.9	39.7	38.2	6.16	6.27	5.67
CHEMICALS & ALLIED PRODS.	435.44	431.27	397.75	42.9	42.7	43.0	10.15	10.10	9.25
PETROLEUM & COAL PRODUCTS	277.63	410.13	404.42	28.8	42.5	43.3	9.65	9.65	9.34
PETROLEUM REFINING	277.88	426.38	423.24	26.9	42.3	43.1	10.33	10.08	9.82
LEATHER & LEATHER PRODUCTS	143.58	148.61	133.91	37.1	38.6	35.9	3.87	3.85	3.73
OTHER NONDURABLE GOODS	258.03	245.78	231.43	42.3	41.8	42.7	6.10	5.88	5.42
NONMANUFACTURING									
MINING	360.01	353.16	323.10	44.6	43.6	45.7	8.09	8.10	7.07
OIL & GAS EXTRACTION	361.86	354.96	326.10	44.4	43.5	45.8	8.15	8.16	7.12
METAL & COAL & NONMET. MRNLS., EXC. FUEL	336.31	318.54	268.62	48.6	46.3	44.4	6.92	6.88	6.05
COMMUNICATIONS, EXCEPT U.S. POSTAL SERV.	316.61	313.10	305.03	40.8	40.4	41.9	7.76	7.75	7.28
ELEC., GAS & SAN. SVCS.	316.47	315.24	299.63	41.1	41.1	42.5	7.70	7.67	7.05
WHOLESALE & RETAIL TRADE	185.35	185.56	173.88	33.7	34.3	34.5	5.50	5.41	5.04
WHOLESALE TRADE	276.00	280.19	256.31	40.0	40.2	39.8	6.90	6.97	6.44
RETAIL TRADE	148.35	148.16	140.18	31.1	32.0	32.3	4.77	4.63	4.34
GENERAL MDSE. STORES	99.86	97.03	117.45	22.8	23.9	28.3	4.38	4.06	4.15
BANKING	176.34	174.17	163.35	37.6	37.7	37.9	4.69	4.62	4.31
FOR THE MAJOR MARKETS									
AMARILLO									
MANUFACTURING	267.46	263.07	244.59	39.8	39.5	39.9	6.72	6.66	6.13
DURABLE GOODS	290.07	282.08	267.15	42.1	41.3	41.1	6.89	6.83	6.50
NONDURABLE GOODS	244.60	242.90	225.23	37.4	37.6	38.9	6.54	6.46	5.79
AUSTIN									
MANUFACTURING	228.00	208.92	190.22	42.3	41.7	40.3	5.39	5.01	4.72
DURABLE GOODS	234.42	210.76	192.71	42.7	41.9	40.4	5.49	5.03	4.77
NONDURABLE GOODS	198.13	198.94	179.90	40.6	40.6	39.8	4.88	4.90	4.52
BEAUMONT									
MANUFACTURING	372.78	398.61	350.40	41.1	43.0	40.0	9.07	9.27	8.76
DURABLE GOODS	330.48	335.32	294.97	40.8	41.5	39.7	8.10	8.08	7.43
NONDURABLE GOODS	419.15	434.06	384.31	41.5	43.8	40.2	10.10	9.91	9.56
CORPUS CHRISTI									
MANUFACTURING	291.20	276.32	275.18	40.0	38.7	39.2	7.28	7.14	7.02
DURABLE GOODS	231.10	233.73	197.82	36.8	37.1	33.7	6.28	6.30	5.87
NONDURABLE GOODS	329.22	301.75	319.37	42.1	39.6	42.3	7.82	7.62	7.55
DALLAS/FT. WORTH									
MANUFACTURING	262.03	267.74	237.55	41.2	41.9	40.4	6.36	6.39	5.88
DURABLE GOODS	276.54	285.90	253.18	41.9	42.8	41.1	6.60	6.68	6.16
NONDURABLE GOODS	232.25	230.75	207.09	39.7	40.2	39.0	5.85	5.74	5.31
EL PASO									
MANUFACTURING	209.72	201.10	179.45	39.2	39.9	38.1	5.35	5.04	4.71
DURABLE GOODS	241.33	243.32	234.18	36.4	39.5	40.1	6.63	6.16	5.84
NONDURABLE GOODS	200.50	185.20	161.63	40.1	40.0	37.5	5.00	4.63	4.31
GALVESTON									
MANUFACTURING	377.12	407.89	389.53	38.6	42.4	42.9	9.77	9.62	9.08
DURABLE GOODS	350.96	341.04	326.99	41.0	39.2	42.8	8.56	8.70	7.64
NONDURABLE GOODS	387.56	441.01	413.99	37.7	42.9	42.9	10.28	10.28	9.65
HOUSTON									
MANUFACTURING	355.89	348.44	328.37	44.1	43.5	43.9	8.07	8.01	7.48
DURABLE GOODS	339.01	330.92	307.27	44.2	44.3	43.4	7.67	7.47	7.08
NONDURABLE GOODS	382.81	377.74	362.96	43.9	42.3	44.7	8.72	8.93	8.12
LUBBOCK									
MANUFACTURING	235.11	226.92	195.09	43.7	42.1	40.9	5.38	5.39	4.77
DURABLE GOODS	217.35	215.60	179.93	40.4	40.0	39.2	5.38	5.39	4.59
NONDURABLE GOODS	272.77	252.39	227.46	50.7	47.0	44.6	5.38	5.37	5.10
SAN ANTONIO									
MANUFACTURING	204.93	205.13	179.72	41.4	40.7	38.9	4.95	5.04	4.62
DURABLE GOODS	196.71	213.79	183.44	39.9	40.8	38.7	4.93	5.24	4.74
NONDURABLE GOODS	212.72	195.69	176.73	42.8	40.6	39.1	4.97	4.82	4.52
WACO									
MANUFACTURING	238.21	236.70	207.58	41.0	40.6	38.8	5.81	5.83	5.35
DURABLE GOODS	237.54	243.43	217.87	41.6	41.4	40.8	5.71	5.88	5.34
NONDURABLE GOODS	237.98	229.47	197.08	40.2	39.7	36.7	5.92	5.78	5.37
WICHITA FALLS									
MANUFACTURING	257.50	252.78	217.17	41.2	40.9	39.2	6.25	6.18	5.54
DURABLE GOODS	273.31	266.50	228.28	41.6	41.0	39.7	6.57	6.50	5.75
NONDURABLE GOODS	208.68	211.53	185.96	39.9	40.6	37.8	5.23	5.21	4.92

*Figures cover Production Workers in Manufacturing and Mining industries only and Nonsupervisory Employees in other industry divisions. Earnings' averages include premium pay for overtime, holidays, and for late-shift work. †Preliminary—subject to revisions upon receipt of additional reports.

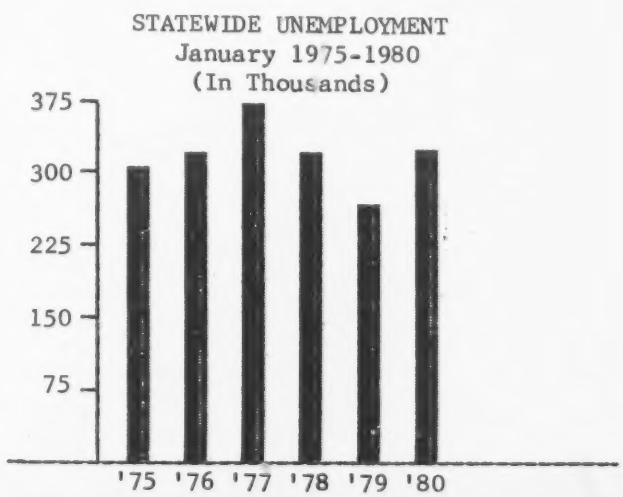
NONAGRICULTURAL WAGE AND SALARY† ESTIMATES—TEXAS

INDUSTRY	JAN* 1980	DEC** 1979	JAN** 1979	CHANGE FROM DEC 1979	CHANGE FROM JAN 1979
‡TOTAL NONAGRICULTURAL EMPLOYMENT	5,725,200	5,754,900	5,406,600	—29,700	318,600
MANUFACTURING	1,039,200	1,042,700	991,000	— 3,500	48,200
DURABLE GOODS	611,900	615,400	578,400	— 3,500	33,500
LUMBER & WOOD PRODUCTS	37,200	37,500	37,100	— 300	100
LOGGING CAMPS, SAWMILLS, PLANING MILLS	8,600	8,600	8,400	0	200
FURNITURE & FIXTURES	18,500	18,900	19,200	— 400	— 700
STONE, CLAY & GLASS PRODUCTS	45,900	45,900	43,500	0	2,400
CONCRETE, GYPSUM & PLASTER PRODUCTS	19,400	19,200	17,700	200	1,700
PRIMARY METAL INDUSTRIES	46,800	47,100	44,300	— 300	2,500
FABRICATED METAL PRODUCTS	94,800	94,200	90,000	600	4,800
FABRICATED STRUCTURAL METAL PRODUCTS	49,800	49,400	47,400	400	2,400
MACHINERY, EXCEPT ELECTRICAL	152,900	152,800	144,500	100	8,400
OIL FIELD MACHINERY	61,000	60,600	57,900	400	3,100
ELECTRIC & ELECTRONIC EQUIPMENT	102,700	104,500	94,400	— 1,800	8,300
TRANSPORTATION EQUIPMENT	81,300	82,700	76,000	— 1,400	5,300
AIRCRAFT & PARTS	48,300	48,000	42,100	300	6,200
INSTRUMENTS & RELATED PRODUCTS	18,900	18,800	17,700	100	1,200
MISCELLANEOUS MANUFACTURING INDUSTRIES	12,900	13,000	11,700	— 100	1,200
NONDURABLE GOODS	427,300	427,300	412,600	0	14,700
FOOD AND KINDRED PRODUCTS	99,000	98,300	96,700	700	2,300
MEAT PRODUCTS	26,700	26,700	26,000	0	700
DAIRY PRODUCTS	5,300	5,300	5,300	0	0
BAKERY PRODUCTS	11,600	11,600	10,800	0	800
MALT BEVERAGES	3,600	3,500	3,300	100	300
TEXTILE MILL PRODUCTS	6,100	6,100	6,200	0	— 100
APPAREL & OTHER FINISHED TEXTILE PRODUCTS	75,300	75,900	74,200	— 600	1,100
PAPER & ALLIED PRODUCTS	22,600	22,600	21,800	0	800
PRINTING & PUBLISHING	60,900	60,800	57,300	100	3,600
NEWSPAPER, PERIODICALS, BOOKS & MISC. PUBL.	32,100	31,900	30,300	200	1,800
CHEMICALS & ALLIED PRODUCTS	81,900	81,800	78,400	100	3,500
PETROLEUM & COAL PRODUCTS	43,200	43,500	40,000	— 300	3,200
PETROLEUM REFINING	39,300	39,600	36,200	— 300	3,100
LEATHER & LEATHER PRODUCTS	7,500	7,400	7,600	100	— 100
OTHER NONDURABLE GOODS	30,800	30,900	30,400	— 100	400
TOTAL NONMANUFACTURING	4,686,000	4,712,200	4,415,600	—26,200	270,400
MINING	211,200	207,200	191,900	4,000	19,300
OIL & GAS EXTRACTION	201,500	197,700	183,500	3,800	18,000
METAL & COAL & NONMET. MRNLS., EXC. FUEL	9,700	9,500	8,400	200	1,300
CONSTRUCTION	431,700	428,700	379,700	3,000	52,000
TRANSPORTATION & PUBLIC UTILITIES	358,200	358,700	339,500	— 500	18,700
RAILROAD TRANSPORTATION	31,900	32,100	30,900	— 200	1,000
TRANSPORTATION, EXCEPT RAILROADS	176,300	179,700	167,500	— 1,400	10,800
TRANSPORTATION BY AIR	35,700	35,800	32,200	— 100	3,500
COMMUNICATION, EXC. U.S. POSTAL SERVICE	79,300	79,000	77,600	300	1,700
ELECTRIC, GAS & SANITARY SERVICES	68,700	67,900	63,500	800	5,200
ELECTRIC SERVICES	36,700	36,000	33,400	700	3,300
GAS PRODUCTION & DISTRIBUTION	27,500	27,400	26,100	100	1,400
WHOLESALE & RETAIL TRADE	1,392,300	1,430,400	1,341,300	—38,100	51,000
WHOLESALE TRADE	404,500	405,600	388,900	— 1,100	15,600
RETAIL TRADE	987,800	1,024,800	952,400	—37,000	35,400
BUILDING MATERIALS & GARDEN SUPPLIES	44,800	46,700	41,500	— 1,900	3,300
GENERAL MERCHANDISE STORES	146,700	161,600	143,900	—14,900	2,800
FOOD STORES	161,400	164,900	156,700	— 3,500	4,700
AUTOMOTIVE DEALERS & SERVICE STATIONS	126,400	126,500	126,500	— 100	— 100
APPAREL & ACCESSORY STORES	74,900	83,900	72,400	— 9,000	2,500
OTHER RETAIL TRADE	433,600	441,200	411,400	— 7,600	22,200
FINANCE, INSURANCE & REAL ESTATE	323,100	321,700	302,600	1,400	20,500
BANKING	84,200	84,300	79,000	— 100	5,200
INSURANCE CARRIERS, AGENTS & BROKERS	112,400	112,100	107,500	300	4,900
OTHER FINANCE, INSURANCE & REAL ESTATE	126,500	125,300	116,100	1,200	10,400
SERVICES	980,200	981,500	918,500	— 1,300	61,700
HOTELS & OTHER LODGING PLACES	54,500	55,700	53,800	— 1,200	700
PERSONAL SERVICES	62,900	64,300	62,800	— 1,400	100
BUSINESS & REPAIR SERVICES	253,200	252,200	232,200	1,000	21,000
AMUSEMENT, INCLUDING MOTION PICTURES	43,200	43,500	35,500	— 300	7,700
HEALTH SERVICES	265,100	262,300	251,600	2,800	13,500
EDUCATIONAL SERVICES	50,100	52,000	49,400	— 1,900	700
OTHER SERVICES & MISCELLANEOUS	251,200	251,500	233,200	— 300	18,000
TOTAL GOVERNMENT	989,300	984,000	942,100	5,300	47,200
TOTAL FEDERAL GOVERNMENT	160,300	161,300	160,900	— 1,000	— 600
TOTAL STATE GOVERNMENT	195,300	196,900	196,300	— 1,600	— 1,000
TOTAL LOCAL GOVERNMENT	633,700	625,800	584,900	7,900	48,800
TOTAL MANUFACTURING PRODUCTION WORKERS	720,100	723,900	691,200	— 3,800	28,900
DURABLE GOODS	415,200	419,200	396,500	— 4,000	18,700
NONDURABLE GOODS	304,900	304,700	294,700	200	10,200

†Estimated number of nonagricultural jobs in Texas without reference to place of residence of workers. ‡Estimates of TEC in cooperation with Bureau of Labor Statistics and Employment and Training Administration, U.S. Department of Labor. *Preliminary—subject to revision. **Revised.

EMPLOYMENT DOWN IN AGRICULTURE

Total employment in agriculture was 163,700 at mid-January and was below the previous month's level of 174,500. Seasonal employment was up from a year ago as 35,500 were employed during January, while 33,600 were employed a year ago. Cotton activities employed 3,210, below the January 1979 total of 3,920, as the cotton harvest was nearing completion. Seasonal workers totaled 7,500 in vegetable activities, up from 4,880 a year ago. In the Lower Rio Grande Valley, the harvest of cabbage, carrots, and lettuce continued. Feed and grain activities accounted for 4,100 seasonal workers, compared to 4,170 last year. Mild temperatures across Texas benefitted the small grains; however, rainfall was scare. Supplemental feeding of livestock continued and most livestock were reported to be in good shape.



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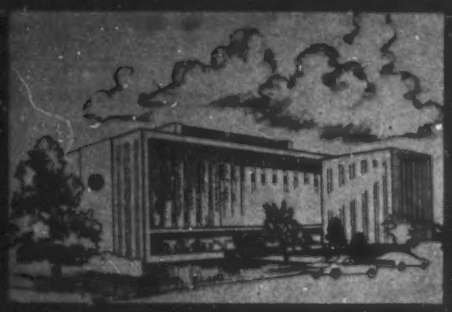

TEXAS LABOR MARKET REVIEW

T.E.C. BUILDING | MARCH 1980 | AUSTIN, TEXAS 78778

STATEWIDE EMPLOYMENT DECREASES

Total employment in Texas underwent a moderate reduction from mid-January to mid-February while total unemployment in the State also experienced a decline. This combination of losses in the employment and unemployment estimates subsequently led to a slight (0.4 percent) drop in the civilian labor force.

Since employment and unemployment both declined, and at approximately the same rate, there was no change in the actual unemployment rate for the State. Texas' rate remained at 5.2 percent from January to February, a mark well above the February 1979 rate of 4.5 percent. The National unemployment rate was also constant from January to February, but at a much higher level of 6.8 percent. The seasonally adjusted rate for February was 4.9 percent for Texas and 6.0 percent for the United States.

Among the major labor market areas in the State, 15 experienced increased rates of unemployment, nine recorded rates below a month ago, and one area's rate was unchanged. Only two of the areas had rates below those of a year ago. Total employment advanced in only three of the 25 areas over the month.

FLUCTUATIONS NOTED IN WAGE AND SALARY

A high level of activity was seen in total nonagricultural wage and salary employment from January to February, but the overall level of employment was essentially unchanged. A very slight gain was recorded over the month as the nonmanufacturing sector added 15,800 jobs to offset a loss of 15,700 jobs in the manufacturing sector.

Both the durable and nondurable goods segments of manufacturing experienced decreases, but a labor-management dispute in the chemical and allied products and the petroleum and coal products portions of nondurable goods was primarily responsible for the decline. Losses in these industries accounted for all of the drop in nondurable goods and for over 90 percent of the overall decrease in manufacturing. Within petroleum and coal products, petroleum refining was responsible for the losses recorded. The labor-management dispute, which involved many chemical plant workers as well as refinery workers, affected more people than any other dispute in recent years.

SUMMARY OF LABOR FORCE† ESTIMATES

	TOTAL EMPLOYMENT‡			TOTAL UNEMPLOYMENT			UNEMPLOYED AS % OF LABOR FORCE		
	FEB* 1980	JAN** 1980	FEB** 1979	FEB* 1980	JAN** 1980	FEB** 1979	FEB* 1980	JAN** 1980	FEB** 1979
STATEWIDE	5,994,300	6,018,200	5,923,900	325,500	327,200	278,700	5.2	5.2	4.5
ABILENE	63,860	63,910	63,340	2,190	2,360	2,210	3.3	3.6	3.4
AMARILLO	85,140	85,780	84,620	3,950	3,450	2,930	4.4	3.9	3.3
AUSTIN	243,200	241,100	240,600	8,400	9,600	7,400	3.3	3.8	3.0
BEAUMONT-PORT ARTHUR-ORANGE	150,000	151,900	155,050	12,300	11,900	11,250	7.6	7.3	6.8
BROWNSVILLE-HARLINGEN-SAN BENITO	65,680	66,200	66,630	8,410	7,980	6,880	11.4	10.8	9.4
BRYAN-COLLEGE STATION	39,710	39,880	38,690	1,500	1,350	1,150	3.6	3.3	2.9
CORPUS CHRISTI	134,100	134,150	132,500	8,300	8,750	6,750	5.8	6.1	4.8
DALLAS-FORT WORTH	1,446,500	1,444,700	1,394,300	63,800	63,100	52,700	4.2	4.2	3.6
EL PASO	154,600	156,750	155,550	15,800	15,750	14,250	9.3	9.1	8.4
GALVESTON-TEXAS CITY	76,930	75,920	75,730	5,440	5,310	4,520	6.6	6.5	5.6
HOUSTON	1,394,200	1,399,900	1,363,800	57,300	61,200	48,400	3.9	4.2	3.4
KILLEEN-TEMPLE	60,160	60,940	59,720	4,020	4,030	2,990	6.3	6.2	4.8
LAREDO	29,720	29,850	28,460	5,120	4,470	4,260	14.7	13.0	13.0
LONGVIEW—MARSHALL	63,010	63,430	62,680	4,390	4,160	3,330	6.5	6.2	5.0
LUBBOCK	97,260	97,850	96,960	4,230	4,230	3,550	4.0	4.1	3.5
MCALLEN-PHARR-EDINBURG	78,900	80,830	76,820	13,550	13,100	11,570	14.7	13.9	13.1
MIDLAND	44,860	45,180	43,420	1,860	2,050	1,590	4.0	4.3	3.5
ODESSA	58,740	59,160	56,770	2,260	2,480	2,410	3.7	4.0	4.1
SAN ANGELO	41,330	41,470	39,910	1,440	1,860	1,320	3.4	3.8	3.2
SAN ANTONIO	389,400	391,050	386,650	26,500	26,500	23,950	6.4	6.3	5.8
SHERMAN-DENISON	37,920	38,110	37,410	2,430	2,340	1,950	6.0	5.8	5.0
TEXARKANA	43,570	43,620	44,040	4,720	4,440	3,900	9.8	9.2	8.1
TYLER	61,750	61,850	61,890	3,500	3,340	2,650	5.4	5.1	4.1
WACO	75,370	75,360	74,550	3,970	3,820	3,180	5.0	4.8	4.1
WICHITA FALLS	57,650	58,020	57,330	2,160	2,200	2,090	3.6	3.7	3.5

†Sum of estimated number of total employed and unemployed workers residing in the specified areas.
‡Includes resident wage and salary workers, self-employed, unpaid family workers and domestics in private households, agricultural workers and workers involved in labor-management disputes.
*Preliminary—subject to revision. **Revised.

TEXAS LABOR MARKET REVIEW
Official Publication of
TEXAS EMPLOYMENT COMMISSION
NOLAN F. WARD ..... Chairman
KEN CLAPP ..... Commissioner
A.C. SHIRLEY ..... Commissioner
ERNIE W. TULLIS, Administrator

Published Monthly at the TEC Building, Austin, Texas
Economic Research and Analysis Department

The only other industry in nondurable goods to post a decline was food and kindred products. Losses in the meat products and bakery products segments led to the drop. Fortunately, both of the decreases were small and were scattered throughout the industries. Apparel and other finished textile products showed increased activity in men's and boys' suits, coats, and furnishings. The gain in this division of the industry accounted for over 80 percent of the advance recorded in the industry as a whole. The only other industry in nondurable goods to post a rise in employment was printing and publishing. The newspapers, periodicals, books, and miscellaneous publishing division of the industry led in the gain as substantial hiring was noted among firms involved in printing and publishing school yearbooks.

A moderate loss was evident in the durable goods sector of manufacturing as several industries posted slight to moderate declines. Many industries which are related to construction experienced employment losses as economic conditions began to affect employment in the building trades. Lumber and wood products; stone, clay and glass products; primary metal industries; and fabricated metal products all suffered losses as business activity went through a downturn. The largest drop in durable goods occurred in electric and electronic equipment. Decreases were widespread within the industry as a majority of the firms reported business losses. Transportation equipment also realized a sizeable decrease as a labor-management dispute was underway in ship and boat building and repairing.

There were some gains registered among the durable goods industries, the most notable of which was a large advance in nonelectrical machinery. The oil field machinery segment of nonelectrical machinery recorded a small gain despite a labor-management dispute involving nearly 500 workers. Most of the other segments of nonelectrical machinery increased also, but the largest gain was in other nonelectrical machinery. Over three-quarters of the total advance in the industry occurred in this segment as increases were noted throughout the division. Furniture and fixtures was up modestly as several small employment rises were seen and a labor-management dispute was resolved within the industry.

The vast majority of the increase in nonmanufacturing was attributed to a substantial gain in government. All sectors of government were up, although the advances were slight on the federal level. State and local government both experienced an upturn as the beginning of the spring semester led to significant increases at state educational institutions and local school districts. The hiring of nonfaculty personnel and some replacement hiring for faculty positions were responsible for the gains.

Services also realized a sizeable increase as almost every segment advanced. Hotels and other lodging places and amusements, including motion pictures, benefitted considerably from over-the-month upswings. Many hotels and amusement facilities began increasing staffs to prepare for spring breaks and warmer weather with its increased outdoor activity. Other segments of services, such as health services and other services and miscellaneous, recorded large jumps in employment while only business and repair services posted a decline.

Water transportation bounced back from a low employment level in January to add over 1,300 workers and led the transportation, except railroad, portion of transportation, communication, and public utilities to a significant gain. Two large firms involved in stevedoring were primarily responsible for the rise. All other segments of the industry advanced except railroad transportation which was unchanged.

Increased activity in the banking and insurance sectors contributed to a moderate hike in finance, insurance, and real estate. Mining climbed as all sectors recorded gains. The advances would have been greater, but several labor-management disputes were begun a month ago and were still affecting employment in the industry.

Construction suffered as rising interest rates and tight credit began to take their toll on the number of new job starts. Special trade construction did manage to climb slightly, but the increases were limited to only a few trades within the industry. Trade posted the most substantial decreases in nonmanufacturing as employment continued to tumble in retail trade. General merchandise stores and apparel and accessory stores were hardest hit as business activity remained low and a few small stores were closed. A few gains were noted in the industry, however, as building materials and garden supplies and food stores actually showed upswings in employment. The approach of warmer weather aided garden supplies, while building materials rose as more homeowners were willing to attempt jobs themselves on a pay-as-you-go basis rather than finance jobs done by contractors.

ADVANCES RECORDED IN HOURLY EARNINGS

An average production worker in manufacturing earned $6.82 each hour during a 41.2 hour week for an average weekly earnings figure of $280.98 during February. Average hourly earnings (AHE) and aver-

HOURS AND EARNINGS IN TEXAS*

SOURCE: TEXAS EMPLOYMENT COMMISSION IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS, U.S. DEPARTMENT OF LABOR

	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	FEB† 1980	JAN 1980	FEB 1979	FEB† 1980	JAN 1980	FEB 1979	FEB† 1980	JAN 1980	FEB 1979
FOR TEXAS									
MANUFACTURING—TOTAL	280.98	273.64	253.78	41.2	40.6	40.8	6.82	6.74	6.22
DURABLE GOODS	28[illegible].79	279.71	256.47	41.5	41.5	41.3	6.79	6.74	6.21
LUMBER & WOOD PRODUCTS	192.96	204.88	196.26	37.4	39.4	40.3	5.16	5.20	4.87
FURNITURE & FIXTURES	164.72	167.39	169.92	37.1	37.7	39.7	4.44	4.44	4.28
STONE, CLAY & GLASS PRODS.	265.17	271.12	240.09	42.7	43.8	41.9	6.21	6.19	5.73
PRIMARY METAL INDUSTRIES	[illegible]	[illegible]	320.80	42.3	42.8	41.5	8.73	8.58	7.73
FABRICATED METAL PRODUCTS	301.44	295.94	267.10	42.1	41.8	41.9	7.16	7.08	6.39
MACHINERY, EXCEPT ELEC.	299.28	296.01	268.51	43.0	42.9	41.5	6.96	6.90	6.47
OIL FIELD MACHINERY	351.20	350.22	314.03	44.4	44.5	42.9	7.91	7.87	7.32
ELEC. & ELECTRONIC EQUIP.	227.08	228.33	224.39	39.7	39.3	41.4	5.72	5.81	5.42
TRANSPORTATION EQUIPMENT	350.49	332.47	304.93	42.9	41.3	41.6	8.17	8.05	7.33
AIRCRAFT & PARTS	411.98	378.86	351.79	47.3	43.2	43.7	8.71	8.77	8.05
INSTR. & RELATED PRODUCTS	207.43	210.68	200.69	38.7	38.8	40.3	5.36	5.43	4.98
MISC. MFG. INDUSTRIES	193.68	191.83	184.60	40.1	40.3	38.7	4.83	4.76	4.77
NONDURABLE GOODS	280.30	264.49	250.85	40.8	39.3	40.2	6.87	6.73	6.24
FOOD & KINDRED PRODUCTS	250.25	257.73	225.64	41.5	42.6	41.1	6.03	6.05	5.49
MEAT PRODUCTS	258.07	267.22	213.74	42.1	43.1	38.1	6.13	6.20	5.61
MALT BEVERAGES	466.20	466.52	426.57	45.0	44.6	42.7	10.36	10.46	9.99
TEXTILE MILL PRODUCTS	197.89	199.13	182.51	41.4	41.4	40.2	4.78	4.81	4.54
APPRL. & OTHER TEXT PROD.	147.94	148.37	131.76	36.8	37.0	36.0	4.02	4.01	3.66
PAPER & ALLIED PRODUCTS	309.33	305.95	272.90	42.2	42.2	41.6	7.33	7.25	6.56
PRINTING & PUBLISHING	240.28	240.95	216.60	38.2	38.8	38.0	6.29	6.21	5.70
CHEMICALS & ALLIED PRODS.	444.10	429.51	394.19	43.2	41.7	42.8	10.28	10.30	9.21
PETROLEUM & COAL PRODUCTS	585.48	290.97	404.20	49.2	29.6	43.0	11.90	9.83	9.40
PETROLEUM REFINING	649.76	293.01	422.30	49.6	27.8	42.7	13.10	10.54	9.89
LEATHER & LEATHER PRODUCTS	156.15	146.63	133.95	37.9	37.5	36.4	4.12	3.91	3.68
OTHER NONDURABLE GOODS	251.76	255.97	231.08	42.1	42.1	42.4	5.98	6.08	5.45
NONMANUFACTURING									
MINING	357.41	362.06	327.60	42.6	44.1	46.6	8.39	8.21	7.03
OIL & GAS EXTRACTION	359.55	363.44	330.17	42.5	44.0	46.7	8.46	8.26	7.07
METAL & COAL & NONMET. MRNLS., EXC. FUEL	320.11	329.71	279.55	45.6	46.9	44.8	7.02	7.03	6.24
COMMUNICATIONS, EXCEPT U.S. POSTAL SERV.	320.66	320.21	294.69	40.9	41.0	41.1	7.84	7.81	7.17
ELEC., GAS & SAN. SVCS.	323.25	321.57	295.11	42.2	41.6	41.8	7.66	7.73	7.06
WHOLESALE & RETAIL TRADE	191.87	185.90	172.69	33.9	33.8	34.4	5.66	5.50	5.02
WHOLESALE TRADE	284.89	280.19	252.80	39.9	40.2	39.5	7.14	6.97	6.40
RETAIL TRADE	152.43	147.26	139.86	31.3	31.2	32.3	4.87	4.72	4.33
GENERAL MDSE. STORES	102.60	99.90	118.49	22.8	22.2	28.9	4.50	4.50	4.10
BANKING	180.03	177.94	163.78	37.9	37.7	38.0	4.75	4.72	4.31
FOR THE MAJOR MARKETS									
AMARILLO									
MANUFACTURING	276.19	279.97	243.58	41.1	41.6	40.8	6.72	6.73	5.97
DURABLE GOODS	285.10	290.53	281.40	42.3	42.6	43.9	6.74	6.82	6.41
NONDURABLE GOODS	267.33	269.18	209.00	39.9	40.6	38.0	6.70	6.63	5.50
AUSTIN									
MANUFACTURING	220.83	222.56	196.46	41.2	41.6	41.1	5.36	5.35	4.78
DURABLE GOODS	225.63	227.52	198.24	41.4	41.9	41.3	5.45	5.43	4.80
NONDURABLE GOODS	199.30	199.49	186.53	40.1	40.3	40.2	4.97	4.95	4.64
BEAUMONT									
MANUFACTURING	378.33	359.20	357.21	40.9	39.3	40.5	9.25	9.14	8.82
DURABLE GOODS	334.84	327.85	295.46	40.1	39.5	39.5	8.35	8.30	7.48
NONDURABLE GOODS	424.51	395.46	395.38	41.7	39.0	41.1	10.18	10.14	9.62
CORPUS CHRISTI									
MANUFACTURING	285.26	287.83	264.32	39.4	39.7	39.1	7.24	7.25	6.76
DURABLE GOODS	239.00	242.08	192.89	36.6	37.3	33.9	6.53	6.49	5.69
NONDURABLE GOODS	314.42	316.42	304.92	41.1	41.2	42.0	7.65	7.68	7.26
DALLAS/FT. WORTH									
MANUFACTURING	261.35	258.22	235.76	40.9	40.6	40.3	6.39	6.36	5.85
DURABLE GOODS	277.13	272.17	251.33	41.8	41.3	41.0	6.63	6.59	6.13
NONDURABLE GOODS	229.13	230.50	206.06	39.1	39.2	39.1	5.86	5.88	5.27
EL PASO									
MANUFACTURING	199.56	198.50	180.57	38.6	38.1	38.5	5.17	5.21	4.69
DURABLE GOODS	233.41	235.87	231.99	36.3	36.4	40.7	6.43	6.48	5.70
NONDURABLE GOODS	187.23	185.46	163.67	39.5	38.8	37.8	4.74	4.78	4.33
GALVESTON									
MANUFACTURING	405.04	368.22	396.77	41.5	38.0	42.3	9.76	9.69	9.38
DURABLE GOODS	314.33	359.16	356.65	38.1	41.0	43.6	8.25	8.76	8.18
NONDURABLE GOODS	447.81	372.32	413.40	43.1	36.9	41.8	10.39	10.09	9.89
HOUSTON									
MANUFACTURING	351.42	346.96	325.57	43.6	43.1	43.7	8.06	8.05	7.45
DURABLE GOODS	338.24	332.78	302.60	43.7	43.5	42.8	7.74	7.65	7.07
NONDURABLE GOODS	373.24	369.70	363.41	43.4	42.3	45.2	8.60	8.74	8.04
LUBBOCK									
MANUFACTURING	217.71	220.18	196.02	41.0	42.1	40.5	5.31	5.23	4.84
DURABLE GOODS	202.13	205.14	186.80	38.5	39.0	40.0	5.25	5.26	4.67
NONDURABLE GOODS	251.95	250.75	222.22	46.4	48.5	42.9	5.43	5.17	5.18
SAN ANTONIO									
MANUFACTURING	202.40	208.75	179.47	40.4	41.5	39.1	5.01	5.03	4.59
DURABLE GOODS	212.13	216.94	183.52	40.1	41.8	38.8	5.29	5.19	4.73
NONDURABLE GOODS	192.98	199.75	175.72	40.8	41.1	39.4	4.73	4.86	4.46
WACO									
MANUFACTURING	229.90	230.47	209.21	38.9	39.6	38.6	5.91	5.82	5.42
DURABLE GOODS	231.24	234.11	221.40	39.8	41.0	41.0	5.81	5.71	5.40
NONDURABLE GOODS	228.31	227.84	196.93	37.8	38.1	36.2	6.04	5.98	5.44
WICHITA FALLS									
MANUFACTURING	251.65	253.13	227.61	40.2	40.5	40.5	6.26	6.25	5.62
DURABLE GOODS	265.28	267.49	243.49	40.5	40.9	41.2	6.55	6.54	5.91
NONDURABLE GOODS	210.11	210.40	182.49	39.2	39.4	38.5	5.36	5.34	4.74

*Figures cover Production Workers in Manufacturing and Mining industries only and Nonsupervisory Employees in other industry divisions. Earnings' averages include premium pay for overtime, holidays, and for late-shift work. †Preliminary—subject to revisions upon receipt of additional reports.

NONAGRICULTURAL WAGE AND SALARY† ESTIMATES—TEXAS

INDUSTRY	FEB* 1980	JAN** 1980	FEB** 1979	CHANGE FROM JAN 1980	CHANGE FROM FEB 1979
‡TOTAL NONAGRICULTURAL EMPLOYMENT	5,711,200	5,711,100	5,447,500	100	263,700
MANUFACTURING	1,026,300	1,042,000	995,700	— 15,700	30,600
DURABLE GOODS	613,100	614,500	582,200	— 1,400	30,900
LUMBER & WOOD PRODUCTS	37,100	37,800	36,700	— 700	400
LOGGING CAMPS, SAWMILLS, PLANING MILLS	8,300	8,500	8,400	— 200	— 100
FURNITURE & FIXTURES	18,600	18,300	17,900	300	700
STONE, CLAY & GLASS PRODUCTS	45,700	46,000	43,800	— 300	1,900
CONCRETE, GYPSUM & PLASTER PRODUCTS	19,200	19,200	17,800	0	1,400
PRIMARY METAL INDUSTRIES	46,900	47,200	44,600	— 300	2,300
FABRICATED METAL PRODUCTS	94,700	94,800	90,800	— 100	3,900
FABRICATED STRUCTURAL METAL PRODUCTS	50,000	49,700	47,700	300	2,300
MACHINERY, EXCEPT ELECTRICAL	154,000	152,300	146,400	1,700	7,600
OIL FIELD MACHINERY	61,200	61,100	58,300	100	2,900
ELECTRIC & ELECTRONIC EQUIPMENT	103,700	104,800	95,200	— 1,100	8,500
TRANSPORTATION EQUIPMENT	80,600	81,400	77,400	— 800	3,200
AIRCRAFT & PARTS	48,400	48,200	43,000	200	5,400
INSTRUMENTS & RELATED PRODUCTS	19,000	18,900	17,700	100	1,300
MISCELLANEOUS MANUFACTURING INDUSTRIES	12,800	13,000	11,700	— 200	1,100
NONDURABLE GOODS	413,200	427,500	413,500	— 14,300	— 300
FOOD AND KINDRED PRODUCTS	98,500	99,100	97,000	— 600	1,500
MEAT PRODUCTS	26,200	26,400	25,900	— 200	300
DAIRY PRODUCTS	5,300	5,300	5,300	0	0
BAKERY PRODUCTS	11,400	11,800	10,800	— 400	600
MALT BEVERAGES	3,500	3,500	3,200	0	300
TEXTILE MILL PRODUCTS	6,100	6,100	6,100	0	0
APPAREL & OTHER FINISHED TEXTILE PRODUCTS	76,300	75,800	74,700	500	1,600
PAPER & ALLIED PRODUCTS	22,500	22,500	21,700	0	800
PRINTING & PUBLISHING	61,300	60,900	57,900	400	3,400
NEWSPAPER, PERIODICALS, BOOKS & MISC. PUBL.	32,600	32,100	30,700	500	1,900
CHEMICALS & ALLIED PRODUCTS	78,900	81,800	77,800	— 2,900	1,100
PETROLEUM & COAL PRODUCTS	31,100	42,900	39,800	— 11,800	— 8,700
PETROLEUM REFINING	27,100	39,000	36,000	— 11,900	— 8,900
LEATHER & LEATHER PRODUCTS	7,600	7,500	7,700	100	— 100
OTHER NONDURABLE GOODS	30,900	30,900	30,800	0	100
TOTAL NONMANUFACTURING	4,684,900	4,669,100	4,451,800	15,800	233,100
MINING	210,000	209,100	192,800	900	17,200
OIL & GAS EXTRACTION	200,400	199,600	184,300	800	16,100
METAL & COAL & NONMET. MRNLS., EXC. FUEL	9,600	9,500	8,500	100	1,100
CONSTRUCTION	424,500	426,700	387,900	— 2,200	36,600
TRANSPORTATION & PUBLIC UTILITIES	359,000	356,900	343,000	2,100	16,000
RAILROAD TRANSPORTATION	31,700	31,700	30,800	0	900
TRANSPORTATION, EXCEPT RAILROADS	179,100	177,600	169,900	1,500	9,200
TRANSPORTATION BY AIR	36,000	35,700	32,300	300	3,700
COMMUNICATION, EXC. U.S. POSTAL SERVICE	79,100	78,900	78,500	200	600
ELECTRIC, GAS & SANITARY SERVICES	69,100	68,700	63,800	400	5,300
ELECTRIC SERVICES	37,100	36,700	33,600	400	3,500
GAS PRODUCTION & DISTRIBUTION	27,500	27,400	26,300	100	1,200
WHOLESALE & RETAIL TRADE	1,381,800	1,391,800	1,335,100	— 10,000	46,700
WHOLESALE TRADE	405,200	404,800	388,500	400	16,700
RETAIL TRADE	976,600	987,000	946,600	— 10,400	30,000
BUILDING MATERIALS & GARDEN SUPPLIES	45,500	45,100	41,600	400	3,900
GENERAL MERCHANDISE STORES	140,900	148,000	138,900	— 7,100	2,000
FOOD STORES	164,400	162,100	156,400	2,300	8,000
AUTOMOTIVE DEALERS & SERVICE STATIONS	124,000	124,700	126,000	— 700	— 2,000
APPAREL & ACCESSORY STORES	74,100	76,800	70,900	— 2,700	3,200
OTHER RETAIL TRADE	427,700	430,300	412,800	— 2,600	14,900
FINANCE, INSURANCE & REAL ESTATE	324,900	323,400	304,500	1,500	20,400
BANKING	85,100	84,200	79,300	900	5,800
INSURANCE CARRIERS, AGENTS & BROKERS	113,100	112,300	108,400	800	4,700
OTHER FINANCE, INSURANCE & REAL ESTATE	126,700	126,900	116,800	— 200	9,900
SERVICES	994,700	985,300	931,300	9,400	63,400
HOTELS & OTHER LODGING PLACES	56,600	55,300	55,100	1,300	1,500
PERSONAL SERVICES	64,000	63,600	63,500	400	500
BUSINESS & REPAIR SERVICES	253,900	254,300	235,500	— 400	18,400
AMUSEMENT, INCLUDING MOTION PICTURES	44,200	43,200	37,000	1,000	7,200
HEALTH SERVICES	267,800	264,700	253,400	3,100	14,400
EDUCATIONAL SERVICES	52,800	51,900	50,400	900	2,400
OTHER SERVICES & MISCELLANEOUS	255,400	252,300	236,400	3,100	19,000
TOTAL GOVERNMENT	990,000	975,900	957,200	14,100	32,800
TOTAL FEDERAL GOVERNMENT	161,000	160,200	161,800	800	— 800
TOTAL STATE GOVERNMENT	199,600	193,100	204,000	6,500	— 4,400
TOTAL LOCAL GOVERNMENT	629,400	622,600	591,400	6,800	38,000
TOTAL MANUFACTURING PRODUCTION WORKERS	706,400	723,600	694,000	— 17,200	12,400
DURABLE GOODS	417,300	418,800	398,700	— 1,500	18,600
NONDURABLE GOODS	289,100	304,800	295,300	— 15,700	— 6,200

†Estimated number of nonagricultural jobs in Texas without reference to place of residence of workers. ‡Estimates of TEC in cooperation with Bureau of Labor Statistics and Employment and Training Administration, U.S. Department of Labor. *Preliminary—subject to revision. **Revised.

age weekly hours (AWH) increased over the month as the average weekly wage rose $7.34 from the January figure of $273.64.

The most startling advance from a month ago was recorded in the petroleum refining portion of petroleum and coal products. As management personnel filled in for production workers during a labor-management dispute, AHE rose $2.56 and AWH rose by 21.8 hours. The increases for the industry as a whole were only slightly less spectacular as petroleum and coal products was up $2.07 in AHE and 19.6 in AWH.

Additional overtime led to a large rise in AHE in leather and leather products although AWH managed only a slight upturn. Incentive pay at a large firm in paper mills, except building paper mills, pushed AHE for paper and allied products up. No change was recorded in AWH, however, as fluctuations within the industry offset each other. Transportation equipment also enjoyed increased AHE due to more overtime, but AWH rose considerably as well. A greater level of business activity led to the hiring of entry-level production workers in several firms in the aircraft and parts portion of transportation equipment. The hiring of these workers caused a rise in AWH, but a slight drop in AHE.

AGRICULTURAL EMPLOYMENT CLIMBS

A moderate advance was seen in total farm employment from mid-January to mid-February. Agricultural employment was 163,700 a month ago and rose to 165,400. Seasonal employment was 37,400 at mid-February, compared to 36,300 for the same period a year ago.

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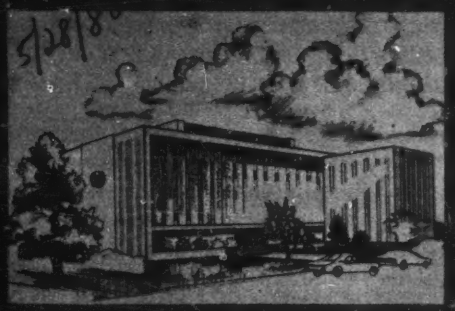

TEXAS LABOR MARKET REVIEW

T.E.C. BUILDING APRIL 1980 AUSTIN, TEXAS 78778

DROP RECORDED IN LABOR FORCE

A modest decline was experienced in the Texas labor force from mid-February to mid-March. The actual drop was 9,400, or 0.1 percent, from 6,319,800 a month ago to 6,310,400. A loss of 34,400 in the State's total employment was responsible for the overall reduction in the labor force. The decrease in total employment amounted to less that 0.6 percent, but came at a time when normally the employment level would be moving upward. Usually the mild spring weather and the approaching Easter season lead to large gains in outdoor activities, particularly construction, and in trade. Although gains were posted in these industries, they were not as substantial as increases experienced during this period in past years.

Total unemployment in Texas climbed over the month from a mid-February level of 325,500 to a mid-March figure of 350,500. The unemployment rate for the State also moved up, rising from 5.2 percent in February to 5.6 percent for March. The current rate for March is the highest recorded for that month since a 5.9 percent mark was posted in 1976. It is also well above the year-ago level of 3.8 percent. The national unemployment rate for March was 6.6 percent, which was slightly below the February rate of 6.8 percent. The seasonally adjusted unemployment rate was 5.8 percent for Texas and 6.2 percent for the United States during March.

Among the major labor market areas in the State, most experienced employment declines similar to the drop realized by the State. The Galveston-Texas City, Laredo, Texarkana, and Waco SMSA's actually managed to post small gains in their total employment levels over the month. Nineteen of the 25 labor market areas saw their unemployment rates increase from February to March and all of the rates were up from a year ago.

WAGE AND SALARY EMPLOYMENT CLIMBS

A moderate upturn was evident in total nonagricultural wage and salary employment from February to March. Advances scored in construction and retail trade were primarily responsible for this upturn in wage and salary employment, but growth in these industries was far behind the year-ago increases for the same period. From February to March last year construction and retail trade accounted for 46 percent of the increase in wage and salary employment. In actual numbers the two industries combined were responsible for 28,800 out of 62,200 jobs added from February to March. This year the combined industries accounted for 12,800 additional jobs, or 66 percent of the total increase of 19,200 in wage and salary employment.

SUMMARY OF LABOR FORCE† ESTIMATES

	TOTAL EMPLOYMENT‡			TOTAL UNEMPLOYMENT			UNEMPLOYED AS % OF LABOR FORCE		
	MAR* 1980	FEB** 1980	MAR** 1979	MAR* 1980	FEB** 1980	MAR** 1979	MAR* 1980	FEB** 1980	MAR** 1979
STATEWIDE	5,959,900	5,994,300	5,923,900	350,500	325,500	231,900	5.6	5.2	3.8
ABILENE	63,240	63,840	64,270	2,410	2,180	1,870	3.7	3.3	2.8
AMARILLO	84,030	85,210	84,770	3,800	3,940	2,490	4.3	4.4	2.9
AUSTIN	241,450	244,050	240,000	8,800	8,400	6,000	3.5	3.3	2.4
BEAUMONT-PORT ARTHUR-ORANGE	148,600	150,800	154,050	13,200	12,350	9,450	8.2	7.6	5.8
BROWNSVILLE-HARLINGEN-SAN BENITO	65,250	65,660	66,500	9,060	8,440	5,910	12.2	11.4	8.2
BRYAN-COLLEGE STATION	39,700	39,760	38,650	1,400	1,510	920	3.4	3.7	2.3
CORPUS CHRISTI	133,950	134,150	133,950	9,000	8,300	5,650	6.3	5.8	4.0
DALLAS-FORT WORTH	1,436,600	1,440,300	1,395,600	66,400	63,800	42,900	4.4	4.2	3.0
EL PASO	154,850	155,200	154,950	17,300	15,850	12,450	10.0	9.3	7.4
GALVESTON-TEXAS CITY	76,620	76,510	75,700	5,830	5,430	3,940	7.1	6.6	4.9
HOUSTON	1,379,700	1,393,200	1,364,700	64,700	57,200	40,500	4.5	3.9	2.9
KILLEEN-TEMPLE	59,440	60,220	59,950	4,300	4,050	2,330	6.7	6.3	3.7
LAREDO	29,850	29,710	28,530	5,400	5,140	4,180	15.3	14.7	12.8
LONGVIEW—MARSHALL	61,750	62,990	63,130	4,730	4,370	2,980	7.1	6.5	4.5
LUBBOCK	96,250	96,890	97,240	4,020	4,050	3,130	4.0	4.0	3.1
MCALLEN-PHARR-EDINBURG	78,190	78,870	75,740	12,830	13,560	10,440	14.1	14.7	12.1
MIDLAND	44,640	44,860	43,190	1,890	1,850	1,060	4.1	4.0	2.4
ODESSA	58,340	58,720	56,490	2,270	2,240	1,960	3.7	3.7	3.4
SAN ANGELO	41,170	41,320	39,820	1,670	1,430	1,100	3.9	3.3	2.7
SAN ANTONIO	385,450	389,450	384,300	29,350	26,500	20,250	7.1	6.4	5.0
SHERMAN-DENISON	37,190	37,650	37,730	2,440	2,420	1,600	6.2	6.0	4.1
TEXARKANA	43,610	43,560	44,430	4,710	4,770	3,490	9.7	9.9	7.3
TYLER	60,710	61,730	61,630	3,580	3,510	2,090	5.6	5.4	3.3
WACO	75,470	75,370	74,680	4,580	3,970	2,570	5.7	5.0	3.3
WICHITA FALLS	57,150	57,810	57,260	2,490	2,160	1,730	4.2	3.6	2.9

†Sum of estimated number of total employed and unemployed workers residing in the specified areas.
‡Includes resident wage and salary workers, self-employed, unpaid family workers and domestics in private households, agricultural workers and workers involved in labor-management disputes.
*Preliminary—subject to revision. **Revised.

TEXAS LABOR MARKET REVIEW
Official Publication of
TEXAS EMPLOYMENT COMMISSION
NOLAN F. WARD ..... Chairman
KEN CLAPP ..... Commissioner
A.C. SHIRLEY ..... Commissioner
ERNIE W. TULLIS, Administrator

Published Monthly at the TEC Building, Austin, Texas
Economic Research and Analysis Department

Improved weather conditions contributed to the gains which were posted in construction. Reports from various areas of the State indicate that residential building has experienced a substantial slowdown in recent weeks as high interest rates have detered many prospective home buyers. Commercial construction, however, has remained relatively strong since many of the current jobs were initiated before interest rates began to move up sharply. Over this past month, general building construction and highway and street construction were largely responsible for the gain.

Retail trade posted a moderate advance as every sector except automotive dealers and service stations realized an increase. New car sales are also suffering from tight credit policies and most of the loss in automotive dealers and service stations was attributed to this portion of the industry. Gains in food stores and other retail trade contributed to the rise in the retail trade sector.

While construction and retail trade provided most of the advance, other segments of nonmanufacturing also managed to record increases. Services was up moderately with the largest gains in amusement, including motion pictures, and other services and miscellaneous. Seasonal employment and the addition of many temporary workers contributed to the rise in amusement. Hotels and other lodging places were up substantially as seasonal workers were added in preparation for warmer weather and the associated increase in travel.

The transportation, except railroads, portion of transportation and public utilities led the segment to a modest increase. Over 80 percent of the segment's rise occurred in transportation, except railroads, and most of this was attributed to gains in trucking, local and long distance. Normally there occurs a period following the busy holiday season when the flow of goods between manufacturing establishments and trade outlets declines; the resumption of that movement of goods following inventories and the normally slack post-holiday season is largely responsible for the increase in trucking.

Government employment moved upward as Federal employment and local government employment advanced. The most significant gains were reported in other Federal nondefense employment and local administrative government. A slight reduction was noted in state government over the month. Finance, insurance, and real estate made a minimal advance as small gains occurred throughout the industry. Employment in mining declined, making it the only major segment of nonmanufacturing to post a decrease. A labor-management dispute in the petroleum and natural gas sector contributed to the decline.

Manufacturing sustained a loss in employment from February to March largely due to a sizeable decrease in the food and kindred products segment of nondurable goods. Employment in meat products dropped moderately due to small losses throughout the segment. One large firm in the canned and preserved fruits and vegetables portion of the food and kindred products industry underwent a major reduction due to a temporary cutback between vegetable harvests.

Seasonal hiring in the publishing and printing of books led to a small gain in printing and publishing. Firms involved in the publication of school yearbooks were primarily responsible for this increase. Other nondurable goods moved up modestly on the basis of an advance in miscellaneous plastic products.

The durable goods sector of manufacturing made a nominal gain due to upswings in nonelectrical machinery and transportation equipment. The settlement of a labor-management dispute boosted employment in oil field machinery, while business activity took an upturn in the aircraft and parts segment of transportation equipment.

HOURS AND EARNINGS SHOW GAIN

An average production worker in manufacturing worked 42 hours per week during March at an hourly rate of $6.96. This resulted in average weekly earnings of $292.32 during the month. Both average weekly hours (AWH) and average hourly earnings (AHE) were up from February and were far above the March 1979 figures. Seasonal influences contributed to advances in AWH and AHE in malt beverages and printing and publishing. The rising demand in malt beverages led to additional overtime and a large gain in AHE. Yearbook publishers provided the thrust behind the increases in printing and publishing.

Meat products, a portion of food and kindred products, realized a sizeable rise in AHE, but a decline in AWH. A reduction in overtime caused the decline in hours while the remaining amount of overtime was worked by higher-paid production workers which resulted in larger AHE.

In the durable goods sector, primary metal industries posted the most significant advances as a majority of the firms in the industry worked additional overtime at premium wages. Earnings advances were noted in transportation equipment, instruments and related products, and miscellaneous manufacturing industries. All of these segments, however, also had drops in AWH. Wage rate increases were behind the gain in AHE in transportation equipment. Fluctuations among the different sectors of instruments and related products led to the decline in hours and rise in hourly earnings. Two segments of the industry experienced business upswings and additional overtime, while another sector (opthalmic goods) underwent a reduc-

HOURS AND EARNINGS IN TEXAS*

SOURCE: TEXAS EMPLOYMENT COMMISSION IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS, U.S. DEPARTMENT OF LABOR

	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	MAR† 1980	FEB 1980	MAR 1979	MAR† 1980	FEB 1980	MAR 1979	MAR† 1980	FEB 1980	MAR 1979
FOR TEXAS									
MANUFACTURING—TOTAL	$292.32	$285.66	$258.52	42.0	41.4	41.1	$6.96	$6.90	$6.29
DURABLE GOODS	289.33	282.99	260.00	42.3	41.8	41.8	6.84	6.77	6.22
LUMBER & WOOD PRODUCTS	203.19	198.22	195.37	39.0	37.9	40.2	5.21	5.23	4.86
FURNITURE & FIXTURES	184.63	183.38	175.03	39.2	39.1	40.8	4.71	4.69	4.29
STONE, CLAY & GLASS PRODS.	278.77	265.79	250.42	43.9	42.8	43.4	6.35	6.21	5.77
PRIMARY METAL INDUSTRIES	384.13	362.53	326.09	43.8	42.6	41.7	8.77	8.51	7.82
FABRICATED METAL PRODUCTS	316.21	296.36	266.68	44.6	41.8	41.7	7.09	7.09	6.40
MACHINERY, EXCEPT ELEC.	303.20	298.08	275.60	43.5	43.2	42.4	6.97	6.90	6.50
OIL FIELD MACHINERY	352.89	349.32	329.44	45.3	44.9	44.7	7.79	7.78	7.37
ELEC. & ELECTRONIC EQUIP.	240.49	240.90	227.39	40.9	40.9	41.8	5.88	5.89	5.44
TRANSPORTATION EQUIPMENT	332.09	349.16	306.18	40.4	43.0	41.6	8.22	8.12	7.36
AIRCRAFT & PARTS	370.30	409.37	340.85	41.7	47.0	42.5	8.88	8.71	8.02
INSTR. & RELATED PRODUCTS	210.37	210.86	204.76	37.3	38.2	41.2	5.64	5.52	4.97
MISC. MFG. INDUSTRIES	196.11	192.37	189.03	39.3	39.5	39.3	4.99	4.87	4.81
NONDURABLE GOODS	295.90	289.87	256.88	41.5	41.0	40.2	7.13	7.07	6.39
FOOD & KINDRED PRODUCTS	256.47	250.06	223.91	41.5	41.4	40.2	6.18	6.04	5.57
MEAT PRODUCTS	258.52	257.42	216.79	41.1	42.2	38.1	6.29	6.10	5.69
MALT BEVERAGES	537.04	466.20	479.17	49.0	45.0	43.8	10.96	10.36	10.94
TEXTILE MILL PRODUCTS	207.10	199.13	182.74	42.7	41.4	39.9	4.85	4.81	4.58
APPRL. & OTHER TEXT PROD.	150.66	148.30	133.88	37.2	36.8	35.7	4.05	4.03	3.75
PAPER & ALLIED PRODUCTS	309.21	306.60	278.46	42.3	42.0	42.0	7.31	7.30	6.63
PRINTING & PUBLISHING	249.85	241.29	221.55	39.1	38.3	38.8	6.39	6.30	5.71
CHEMICALS & ALLIED PRODS.	448.76	442.47	406.08	43.4	43.0	43.2	10.34	10.29	9.40
PETROLEUM & COAL PRODUCTS	626.58	605.16	429.71	50.9	49.2	44.3	12.31	12.30	9.70
PETROLEUM REFINING	672.31	649.76	450.40	51.4	49.6	44.2	13.08	13.10	10.19
LEATHER & LEATHER PRODUCTS	157.82	155.39	137.27	38.4	37.9	37.0	4.11	4.10	3.71
OTHER NONDURABLE GOODS	256.61	250.67	230.11	43.2	42.2	42.3	5.94	5.94	5.44
NONMANUFACTURING									
MINING	386.51	372.67	328.64	46.4	44.9	45.9	8.33	8.30	7.16
OIL & GAS EXTRACTION	389.76	375.81	330.48	46.4	44.9	45.9	8.40	8.37	7.20
METAL & COAL & NONMET. MRNLS., EXC. FUEL	316.48	314.62	280.00	46.0	45.4	44.8	6.88	6.93	6.25
COMMUNICATIONS, EXCEPT U.S. POSTAL SERV.	320.54	321.81	288.75	41.2	41.1	40.9	7.78	7.83	7.06
ELEC., GAS & SAN. SVCS.	326.04	322.98	293.15	41.8	42.0	41.7	7.80	7.69	7.03
WHOLESALE & RETAIL TRADE	191.52	189.62	176.40	34.2	33.8	35.0	5.60	5.61	5.04
WHOLESALE TRADE	285.11	281.69	257.04	40.1	39.9	40.1	7.11	7.06	6.41
RETAIL TRADE	152.96	150.70	143.44	31.8	31.2	32.9	4.81	4.83	4.36
GENERAL MDSE. STORES	105.07	101.25	122.18	23.4	22.6	29.8	4.49	4.48	4.10
BANKING	177.38	177.57	163.45	37.5	37.7	38.1	4.73	4.71	4.29
FOR THE MAJOR MARKETS									
AMARILLO									
MANUFACTURING	280.14	279.39	245.02	42.0	41.7	40.3	6.67	6.70	6.08
DURABLE GOODS	289.33	287.43	271.35	42.3	41.9	42.2	6.84	6.86	6.43
NONDURABLE GOODS	271.70	271.41	218.88	41.8	41.5	38.4	6.50	6.54	5.70
AUSTIN									
MANUFACTURING	223.43	219.10	193.58	41.3	40.8	41.1	5.41	5.37	4.71
DURABLE GOODS	228.25	223.45	194.99	41.5	41.0	41.4	5.50	5.45	4.71
NONDURABLE GOODS	200.60	198.80	187.46	40.2	40.0	39.8	4.99	4.97	4.71
BEAUMONT									
MANUFACTURING	472.93	464.54	388.29	44.7	44.2	43.0	10.58	10.51	9.03
DURABLE GOODS	349.92	330.46	309.48	40.5	39.2	41.1	8.64	8.43	7.53
NONDURABLE GOODS	607.38	609.35	433.06	49.3	49.5	44.1	12.32	12.31	9.82
CORPUS CHRISTI									
MANUFACTURING	287.90	287.10	271.74	38.8	39.6	38.6	7.42	7.25	7.04
DURABLE GOODS	252.50	245.06	195.17	36.2	37.3	34.3	6.61	6.57	5.69
NONDURABLE GOODS	311.25	314.83	316.06	39.2	41.1	41.1	7.94	7.66	7.69
DALLAS/FT. WORTH									
MANUFACTURING	265.92	263.86	239.13	41.1	41.1	40.6	6.47	6.42	5.89
DURABLE GOODS	280.06	279.30	253.58	41.8	42.0	41.3	6.70	6.65	6.14
NONDURABLE GOODS	236.61	232.26	210.90	39.5	39.3	39.2	5.99	5.91	5.38
EL PASO									
MANUFACTURING	200.98	200.98	182.67	38.8	38.8	39.2	5.18	5.18	4.66
DURABLE GOODS	234.70	236.35	234.36	35.4	36.7	40.9	6.63	6.44	5.73
NONDURABLE GOODS	189.20	188.02	165.59	40.0	39.5	38.6	4.73	4.76	4.29
GALVESTON									
MANUFACTURING	427.32	410.18	413.47	42.1	41.1	43.8	10.15	9.98	9.44
DURABLE GOODS	383.36	338.30	353.32	41.4	38.4	44.0	9.26	8.81	8.03
NONDURABLE GOODS	449.65	445.20	437.44	42.5	42.4	43.7	10.58	10.50	10.01
HOUSTON									
MANUFACTURING	351.48	346.33	325.07	43.5	43.4	43.4	8.08	7.98	7.49
DURABLE GOODS	337.65	331.78	304.99	43.4	43.2	43.2	7.78	7.68	7.06
NONDURABLE GOODS	376.24	372.30	358.72	43.8	43.8	43.8	8.59	8.50	8.19
LUBBOCK									
MANUFACTURING	214.80	214.12	199.07	40.0	39.8	41.3	5.37	5.38	4.82
DURABLE GOODS	206.80	200.98	187.86	38.8	38.2	40.4	5.33	5.26	4.65
NONDURABLE GOODS	231.06	241.92	222.40	42.4	43.2	43.1	5.45	5.60	5.16
SAN ANTONIO									
MANUFACTURING	210.92	204.91	185.72	42.1	40.9	40.2	5.01	5.01	4.62
DURABLE GOODS	221.00	216.00	191.52	42.5	41.3	39.9	5.20	5.23	4.80
NONDURABLE GOODS	201.06	193.11	180.18	41.8	40.4	40.4	4.81	4.78	4.46
WACO									
MANUFACTURING	232.80	226.40	215.67	38.8	38.7	39.5	6.00	5.85	5.46
DURABLE GOODS	239.00	230.87	230.29	39.9	39.6	42.1	5.99	5.83	5.47
NONDURABLE GOODS	224.77	220.71	199.84	37.4	37.6	36.6	6.01	5.87	5.46
WICHITA FALLS									
MANUFACTURING	257.75	254.70	224.24	40.4	40.3	39.9	6.38	6.32	5.62
DURABLE GOODS	273.62	269.43	238.50	40.9	40.7	40.7	6.69	6.62	5.86
NONDURABLE GOODS	211.38	209.97	180.59	39.0	39.1	38.1	5.42	5.37	4.74

*Figures cover Production Workers in Manufacturing and Mining industries only and Nonsupervisory Employees in other industry divisions. Earnings averages include premium pay for overtime, holidays, and for late-shift work. †Preliminary—subject to revisions upon receipt of additional reports.

NONAGRICULTURAL WAGE AND SALARY† ESTIMATES—TEXAS

INDUSTRY	MAR* 1980	FEB** 1980	MAR** 1979	CHANGE FROM FEB 1980	CHANGE FROM MAR 1979
‡TOTAL NONAGRICULTURAL EMPLOYMENT	5,741,700	5,723,300	5,509,700	18,400	232,000
MANUFACTURING	1,036,100	1,036,900	1,006,600	— 800	29,500
DURABLE GOODS	615,700	615,500	590,000	200	25,700
LUMBER & WOOD PRODUCTS	37,000	37,400	37,300	— 400	— 300
LOGGING CAMPS, SAWMILLS, PLANING MILLS	8,200	8,300	8,500	— 100	— 300
FURNITURE & FIXTURES	18,800	18,800	18,900	0	— 100
STONE, CLAY & GLASS PRODUCTS	45,700	46,000	44,700	— 300	1,000
CONCRETE, GYPSUM & PLASTER PRODUCTS	19,500	19,300	18,300	200	1,200
PRIMARY METAL INDUSTRIES	47,400	47,100	45,100	300	2,300
FABRICATED METAL PRODUCTS	94,800	95,000	90,800	— 200	4,000
FABRICATED STRUCTURAL METAL PRODUCTS	50,200	50,000	47,500	200	2,700
MACHINERY, EXCEPT ELECTRICAL	155,600	154,800	147,900	800	7,700
OIL FIELD MACHINERY	61,900	61,200	58,800	700	3,100
ELECTRIC & ELECTRONIC EQUIPMENT	103,700	104,000	97,500	— 300	6,200
TRANSPORTATION EQUIPMENT	81,100	80,700	78,400	400	2,700
AIRCRAFT & PARTS	48,900	48,400	43,400	500	5,500
INSTRUMENTS & RELATED PRODUCTS	18,900	18,900	17,700	0	1,200
MISCELLANEOUS MANUFACTURING INDUSTRIES	12,700	12,800	11,700	— 100	1,000
NONDURABLE GOODS	420,400	421,400	416,600	— 1,000	3,800
FOOD AND KINDRED PRODUCTS	96,800	98,800	96,600	— 2,000	200
MEAT PRODUCTS	25,700	26,300	25,300	— 600	400
DAIRY PRODUCTS	5,300	5,300	5,300	0	0
BAKERY PRODUCTS	11,700	11,700	10,800	0	900
MALT BEVERAGES	3,600	3,500	3,400	100	200
TEXTILE MILL PRODUCTS	6,200	6,100	5,900	100	300
APPAREL & OTHER FINISHED TEXTILE PRODUCTS	76,200	76,200	74,700	0	1,500
PAPER & ALLIED PRODUCTS	22,500	22,600	21,700	— 100	800
PRINTING & PUBLISHING	61,700	61,300	58,500	400	3,200
NEWSPAPER, PERIODICALS, BOOKS & MISC. PUBL	32,900	32,600	31,000	300	1,900
CHEMICALS & ALLIED PRODUCTS	78,600	78,800	78,200	— 200	400
PETROLEUM & COAL PRODUCTS	39,100	39,000	42,400	100	— 3,300
PETROLEUM REFINING	35,200	35,100	38,500	100	— 3,300
LEATHER & LEATHER PRODUCTS	7,800	7,600	7,700	200	100
OTHER NONDURABLE GOODS	31,500	31,000	30,900	500	600
TOTAL NONMANUFACTURING	4,705,600	4,686,400	4,503,100	19,200	202,500
MINING	211,800	212,300	194,800	— 500	17,000
OIL & GAS EXTRACTION	202,100	202,600	186,100	— 500	16,000
METAL & COAL & NONMET. MRNLS., EXC. FUEL	9,700	9,700	8,700	0	1,000
CONSTRUCTION	431,500	426,500	404,900	5,000	26,600
TRANSPORTATION & PUBLIC UTILITIES	380,600	359,000	344,500	1,600	16,100
RAILROAD TRANSPORTATION	31,700	31,600	31,100	100	600
TRANSPORTATION, EXCEPT RAILROADS	180,300	179,000	170,000	1,300	10,300
TRANSPORTATION BY AIR	35,900	35,900	32,600	0	3,300
COMMUNICATION, EXC. U.S. POSTAL SERVICE	79,400	79,300	79,100	100	300
ELECTRIC, GAS & SANITARY SERVICES	69,200	69,100	64,300	100	4,900
ELECTRIC SERVICES	37,300	37,100	33,800	200	3,500
GAS PRODUCTION & DISTRIBUTION	27,200	27,300	26,500	— 100	700
WHOLESALE & RETAIL TRADE	1,384,600	1,376,200	1,348,700	8,400	35,900
WHOLESALE TRADE	406,400	405,800	390,300	600	16,100
RETAIL TRADE	978,200	970,400	958,400	7,800	19,800
BUILDING MATERIALS & GARDEN SUPPLIES	45,600	45,400	43,300	200	2,300
GENERAL MERCHANDISE STORES	141,100	140,600	140,500	500	600
FOOD STORES	162,500	160,900	157,600	1,600	4,900
AUTOMOTIVE DEALERS & SERVICE STATIONS	122,100	123,400	126,600	— 1,300	— 4,500
APPAREL & ACCESSORY STORES	74,800	74,200	71,700	600	3,100
OTHER RETAIL TRADE	432,100	425,900	418,700	6,200	13,400
FINANCE, INSURANCE & REAL ESTATE	325,400	325,100	306,900	300	18,500
BANKING	85,500	85,100	79,800	400	5,700
INSURANCE CARRIERS, AGENTS & BROKERS	113,300	113,100	108,600	200	4,700
OTHER FINANCE, INSURANCE & REAL ESTATE	126,600	126,900	118,500	— 300	8,100
SERVICES	995,600	992,700	942,100	2,900	53,500
HOTELS & OTHER LODGING PLACES	57,600	56,700	56,600	900	1,000
PERSONAL SERVICES	63,400	64,000	64,000	— 600	— 600
BUSINESS & REPAIR SERVICES	254,000	253,700	236,800	300	17,200
AMUSEMENT, INCLUDING MOTION PICTURES	45,200	43,900	40,400	1,300	4,800
HEALTH SERVICES	266,300	266,400	254,500	— 100	11,800
EDUCATIONAL SERVICES	52,600	52,700	50,100	— 100	2,500
OTHER SERVICES & MISCELLANEOUS	256,500	255,300	239,700	1,200	16,800
TOTAL GOVERNMENT	996,100	994,600	961,200	1,500	34,900
TOTAL FEDERAL GOVERNMENT	162,500	161,900	161,900	600	600
TOTAL STATE GOVERNMENT	198,600	199,400	204,200	— 800	— 5,600
TOTAL LOCAL GOVERNMENT	635,000	633,300	595,100	1,700	39,900
TOTAL MANUFACTURING PRODUCTION WORKERS	713,100	715,700	701,200	— 2,600	11,900
DURABLE GOODS	417,500	418,600	404,000	— 1,100	13,500
NONDURABLE GOODS	295,600	297,100	297,200	— 1,500	— 1,600

†Estimated number of nonagricultural jobs in Texas without reference to place of residence of workers. ‡Estimates of TEC in cooperation with Bureau of Labor Statistics and Employment and Training Administration, U.S. Department of Labor. *Preliminary—subject to revision. **Revised.

tion in business activity. The shifts in hours and earnings in miscellaneous manufacturing were attributed to fluctuations in overtime hours.

Among the nonmanufacturing industries, the most substantial gain in AHE was reported in electric, gas, and sanitary services. A reduction in business activity in gas production and distribution led to decreased hiring of entry-level production workers in the segment. Hours declined slightly with the reduction in business, but wages rose modestly due to the lack of additional lower-paid workers.

ADVANCES NOTED IN FARM EMPLOYMENT

Total employment in agriculture rose from 165,400 in February to 178,200 at mid-March. Seasonal employment climbed from 48,230 a year ago to 49,890 at mid-month. Cotton activities employed 7,570 worker this month compared to 7,510 a year ago. Cotton planting was underway in South Texas over the month.

Seasonal workers involved in vegetable activities numbered 10,540, well above the year-ago figure of 9,030. A large supply of carrots, cabbage, and lettuce was evident in the Lower Rio Grande Valley. The citrus harvest was still underway in the Lower Valley also.

Feed and grain activities provided work for 12,010 seasonal employees, slightly fewer than were employed during the same period last year. Sorghum planting was ahead of the year-ago pace. Peach trees were in full bloom in the eastern part of the State and pecan trees were beginning to bud. Pastures across most of the State were in need of moisture as the supplemental feeding of livestock continued in many localities.

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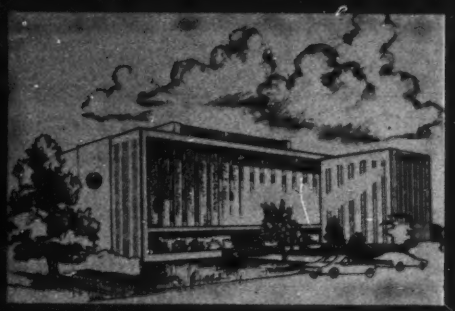
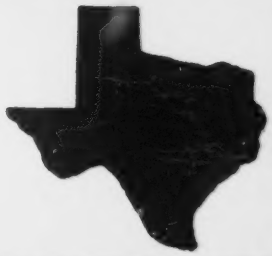


TEXAS LABOR MARKET REVIEW



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STATEWIDE EMPLOYMENT ADVANCES

The Texas labor force declined modestly from mid-March to mid-April as employment climbed and unemployment dropped sharply. Increased outdoor activity led to employment increases in many industries as businesses prepared for the summer season. A gain of 0.5 percent was realized in the State's employment level during the month.

Unemployment decreased 14.8 percent over the same period as many of the previously unemployed were able to locate jobs. The unemployment rate for Texas fell from 5.6 percent in March to 4.8 percent for April. Although the April rate was the lowest for this year, it was well above the year-ago rate of 3.9 percent. The total number of unemployed persons for the month was 24 percent above the April 1979 level. The actual unemployment rate for the United States was 6.6 percent during April. The seasonally adjusted unemployment rate for Texas was 5.4 percent and for the Nation it was 7.0 percent.

Among the 25 major labor market areas, each experienced a decline in total unemployment and in its unemployment rate. Eleven of the areas had rates of below 4.0 percent, while five areas realized unemployment rates of over 8.0 percent. Most of the areas reported small gains in employment, although five areas did suffer very modest losses.

WAGE AND SALARY MOVES UPWARD

Nonagricultural wage and salary employment continued to climb steadily as it registered a moderate increase from March to April. The increase was split evenly between the manufacturing and nonmanufacturing sectors as a gain was recorded in manufacturing for the first time this year.

The settlement of a labor-management dispute which had been affecting employment in the chemicals and allied products and the petroleum and coal products segments of nondurable goods was responsible for the advance in manufacturing. **Nondurable goods increased 5,800,** while chemicals and allied products and petroleum and coal products together advanced 6,400. These two segments were thus able to offset losses which occurred chiefly in food and kindred products and other nondurable goods. Fluctuations were noted throughout food and kindred products, but meat products abosrbed most of the decline as several small losses were reported in the segment. The only other significant change among the nondurable goods industries was a moderate increase posted by apparel and other finished textile products where business activity rose leading to an advance for the segment.

The durable goods portion of manufacturing increased slightly over the month as many construction-related in-

SUMMARY OF LABOR FORCE† ESTIMATES

	TOTAL EMPLOYMENT‡			TOTAL UNEMPLOYMENT			UNEMPLOYED AS % OF LABOR FORCE		
	APR* 1980	MAR** 1980	APR** 1979	APR* 1980	MAR** 1980	APR** 1979	APR* 1980	MAR** 1980	APR** 1979
STATEWIDE	5,988,200	5,959,900	5,910,400	288,800	350,500	241,300	4.8	5.6	3.9
ABILENE	63,290	63,220	63,370	2,160	2,400	1,850	3.3	3.7	2.8
AMARILLO	84,250	83,960	84,440	3,310	3,790	2,700	3.8	4.3	3.1
AUSTIN	241,850	241,500	238,400	8,400	8,800	6,150	3.4	3.5	2.5
BEAUMONT-PORT ARTHUR-ORANGE	148,250	147,900	153,250	11,000	13,200	9,850	6.9	8.2	6.0
BROWNSVILLE-HARLINGEN-SAN BENITO	65,220	65,240	65,940	7,620	9,110	5,990	10.5	12.3	8.3
BRYAN-COLLEGE STATION	39,560	39,690	39,170	1,300	1,400	920	3.2	3.4	2.3
CORPUS CHRISTI	133,750	133,150	134,000	7,650	9,000	5,850	5.4	6.3	4.2
DALLAS-FORT WORTH	1,446,800	1,437,800	1,396,400	57,800	66,400	46,800	3.8	4.4	3.2
EL PASO	155,650	155,100	153,350	14,500	17,300	12,750	8.5	10.0	7.7
GALVESTON-TEXAS CITY	76,850	76,380	75,700	4,890	5,830	3,980	6.0	7.1	5.0
HOUSTON	1,381,000	1,379,800	1,357,600	55,700	64,600	42,200	3.9	4.5	3.0
KILLEEN-TEMPLE	60,060	59,600	59,610	3,550	4,300	2,700	5.6	6.7	4.3
LAREDO	30,420	29,840	28,790	3,900	5,400	3,850	11.4	15.3	11.8
LONGVIEW—MARSHALL	61,770	61,730	62,430	4,080	4,740	3,220	6.2	7.1	4.9
LUBBOCK	97,190	96,490	96,400	3,870	4,020	3,160	3.8	4.0	3.2
MCALLEN-PHARR-EDINBURG	78,890	78,170	77,130	10,020	12,890	10,260	11.3	14.2	11.7
MIDLAND	44,630	45,340	43,100	1,590	1,910	1,220	3.4	4.0	2.8
ODESSA	58,740	58,320	56,480	2,100	2,270	1,850	3.5	3.7	3.2
SAN ANGELO	41,510	41,130	39,680	1,450	1,670	1,160	3.4	3.9	2.8
SAN ANTONIO	387,350	385,250	383,250	24,150	29,350	21,000	5.9	7.1	5.2
SHERMAN-DENISON	37,140	37,290	37,480	2,150	2,440	1,770	5.5	6.1	4.5
TEXARKANA	43,550	43,340	45,390	4,150	4,740	3,590	8.7	9.9	7.3
TYLER	60,330	60,700	61,260	3,120	3,570	2,290	4.9	5.6	3.6
WACO	75,470	75,560	74,210	3,780	4,590	2,950	4.8	5.7	3.8
WICHITA FALLS	57,150	57,100	56,960	2,210	2,490	1,880	3.7	4.2	3.2

†Sum of estimated number of total employed and unemployed workers residing in the specified areas.
‡Includes resident wage and salary workers, self-employed, unpaid family workers and domestics in private households, agricultural workers and workers involved in labor-management disputes.
*Preliminary—subject to revision **Revised

TEXAS LABOR MARKET REVIEW
Official Publication of
TEXAS EMPLOYMENT COMMISSION
NOLAN F. WARD ..... Chairman
KEN CLAPP ..... Commissioner
A.C. SHIRLEY ..... Commissioner
ERNIE W. TULLIS, Administrator

Published Monthly at the TEC Building, Austin, Texas
Economic Research and Analysis Department

dustries reported losses. Lumber and wood products; furniture and fixtures; stone, clay, and glass products; and fabricated metal products suffered moderate losses as business activity declined. The only other drop which occurred in the durable goods sector was a slight dip in electric and electronic equipment.

Transportation equipment experienced a sizeable gain as workers returned following a temporary layoff in motor vehicles and motor vehicle equipment. The aircraft and parts portion of transportation equipment also rose due to increased business activity. Elsewhere in durable goods, miscellaneous manufacturing industries advanced with most of the employment activity concentrated in firms that manufacture toys and amusement, sporting, and athletic goods.

Employment in the nonmanufacturing portion of wage and salary employment grew as trade and construction posted large advances. Trade accounted for the most substantial gain as other retail trade experienced considerable expansion over the month. The segment of other retail trade which showed the largest increase was eating and drinking places. The increase was primarily seasonal in nature as many establishments which operate outdoors and which cater primarily to tourists opened for the summer season. Two other segments of the retail trade which reported more business were furniture, home furnishings, and equipment stores; and miscellaneous retail. Another sector of retail which rose considerably was building materials and garden supplies. The onset of spring and the associated increase in outdoor activity was directly responsible for the gain in the sector. Apparel and accessory stores eased upward over the month as the sale of summer sportswear led to increased business for many stores. Losses were noted in general merchandise stores, food stores, and automotive dealers and service stations. Food stores had the largest decline, but still remained at a level well above the year-ago mark. On the other hand, automotive dealers and service stations has dropped substantially below the April 1980 figure for the industry due to rising gasoline costs, high interest rates on new car loans, and fewer hours of operations at many service stations.

Construction was up as employment in heavy construction realized a moderate increase. Financial considerations have recently plagued general building construction and special trade contractors. Heavy construction has not been immune to the current financial situation, but the relatively lengthy lead time required for the heavy construction jobs has made the industry less volatile than the other portions of construction.

Counter movements in the transportation, except railroad, segment of transportation and public utilities resulted in a modest gain for the industry. Trucking and warehousing realized a moderate decline, while water transportation experienced the largest increase within the segment. All portions of electric, gas, and sanitary services rose as electric services led the way.

The only major industry divisions to report losses were services and government. A moderate drop in hotels and other lodging places contributed to the overall decline in services. The closing of a large hotel accounted for a significant part of the decrease. Modest cutbacks were also noted in business and repair services, health services, and other services. The only gain in services was a moderate upturn in amusement, including motion pictures, which resulted from a seasonal increase in amusement and recreation services.

INCREASE NOTED IN HOURLY EARNINGS

An average production worker in manufacturing earned $7.02 per hour during April which was an increase of six cents from the March average hourly earnings (AHE) figure of $6.96. Over the same period, average weekly hours (AWH) for an average production worked slipped from 41.5 in March to 40.8 in April. The average weekly earnings dropped slightly in spite of the increase in AHE due to the reduction in hours worked.

The most notable shift in AHE and AWH occurred in the petroleum refining portion of petroleum and coal products. The large declines recorded in this segment were realized as an ongoing labor-management dispute was settled and the supervisory personnel who had been substituting for production workers were replaced by the returning workers. With conditions returning the normal, the higher-paid supervisory personnel were taken out of production and the hours and earnings began to approach average levels for the industry.

Another industry affected by labor-management disputes, chemicals and allied products, saw its AWH decrease, but its AHE advance significantly. Wage rate increases and overtime pay were responsible for the jump in AHE. Other industries experiencing gains in AHE and decreases in AWH were machinery, except electric; transportation equipment; and primary metal industries. Machinery, except electric, and primary metal industries were affected by cutbacks in business activity, while a substantially large firm underwent a change in the amount of shift work with pay differential in transportation equipment.

Malt beverages took an upturn in AWH, but showed a loss in AHE as many firms reduced their payrolls causing the retained employees to put in a longer work week. Hours and earnings declined in stone, clay, and glass products as business activity took a downturn.

FARM EMPLOYMENT SHOWS GAIN

Agricultural employment in Texas rose from 178,200 at mid-March to 191,300 at mid-April. The number of sea-

HOURS AND EARNINGS IN TEXAS*

SOURCE: TEXAS EMPLOYMENT COMMISSION IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS, U.S. DEPARTMENT OF LABOR

	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	APRIL† 1980	MARCH 1980	APRIL 1979	APR† 1980	MAR 1980	APR 1979	APR† 1980	MAR 1980	APR 1979
FOR TEXAS									
MANUFACTURING—TOTAL	$286.42	$288.84	$254.16	40.8	41.5	39.9	$7.02	$6.96	$6.37
DURABLE GOODS	283.59	284.81	249.60	41.1	41.7	40.0	6.90	6.83	6.24
LUMBER & WOOD PRODUCTS	201.10	201.98	194.49	37.8	38.4	40.1	5.32	5.26	4.85
FURNITURE & FIXTURES	173.35	180.18	169.81	37.2	38.5	39.4	4.66	4.68	4.31
STONE, CLAY & GLASS PRODS.	262.88	278.77	257.09	42.4	43.9	43.5	6.20	6.35	5.91
PRIMARY METAL INDUSTRIES	375.33	374.03	339.00	42.7	43.9	41.8	8.79	8.52	8.11
FABRICATED METAL PRODUCTS	300.96	301.44	256.61	41.8	42.1	39.6	7.20	7.16	6.48
MACHINERY, EXCEPT ELEC.	302.03	302.56	253.68	42.6	43.1	39.7	7.09	7.02	6.39
OIL FIELD MACHINERY	352.66	354.47	298.25	43.7	44.7	40.8	8.07	7.93	7.31
ELEC. & ELECTRONIC EQUIP.	233.78	239.27	213.05	40.1	40.9	39.6	5.83	5.85	5.38
TRANSPORTATION EQUIPMENT	340.17	333.73	284.36	40.4	40.6	38.9	8.42	8.22	7.31
AIRCRAFT & PARTS	362.97	370.35	311.55	41.2	41.8	40.2	8.81	8.86	7.75
INSTR. & RELATED PRODUCTS	200.93	207.31	192.94	36.8	37.9	38.9	5.46	5.47	4.96
MISC. MFG. INDUSTRIES	198.59	192.18	178.89	40.2	39.3	37.9	4.94	4.89	4.72
NONDURABLE GOODS	290.07	293.04	260.04	40.4	41.1	39.7	7.18	7.13	6.55
FOOD & KINDRED PRODUCTS	253.53	252.34	230.77	40.5	40.7	40.7	6.26	6.20	5.67
MEAT PRODUCTS	249.64	255.63	221.95	39.5	40.9	38.4	6.32	6.25	5.78
MALT BEVERAGES	564.98	526.45	534.25	53.1	48.7	48.7	10.64	10.81	11.44
TEXTILE MILL PRODUCTS	219.92	207.40	168.72	44.7	42.5	38.0	4.92	4.88	4.44
APPRL. & OTHER TEXT PROD.	147.06	149.08	127.94	36.4	36.9	34.3	4.04	4.04	3.73
PAPER & ALLIED PRODUCTS	312.61	308.55	276.22	43.0	42.5	40.8	7.27	7.26	6.77
PRINTING & PUBLISHING	252.20	252.98	215.04	39.1	39.1	38.4	6.45	6.47	5.60
CHEMICALS & ALLIED PRODS.	455.38	452.05	425.54	42.4	43.3	43.6	10.74	10.44	9.76
PETROLEUM & COAL PRODUCTS	509.78	600.87	442.88	44.6	49.7	44.2	11.43	12.09	10.02
PETROLEUM REFINING	537.12	644.79	486.75	44.5	50.1	44.2	12.07	12.87	10.56
LEATHER & LEATHER PRODUCTS	160.09	156.24	127.39	38.3	38.2	34.9	4.18	4.09	3.65
OTHER NONDURABLE GOODS	251.03	252.78	215.46	41.7	42.7	39.9	6.02	5.92	5.40
NONMANUFACTURING									
MINING	391.44	381.05	328.70	46.6	46.3	44.6	8.40	8.23	7.37
OIL & GAS EXTRACTION	394.70	383.83	330.93	46.6	46.3	44.6	8.47	8.29	7.42
METAL & COAL & NONMET. MRNLS., EXC. FUEL	332.43	324.80	286.84	47.9	46.6	45.1	6.94	6.97	6.36
COMMUNICATIONS, EXCEPT U.S. POSTAL SERV.	318.78	315.34	289.98	41.4	40.9	40.9	7.70	7.71	7.09
ELEC., GAS & SAN. SVCS.	333.06	327.76	294.56	42.0	41.7	41.9	7.93	7.86	7.03
WHOLESALE & RETAIL TRADE	191.61	189.34	177.99	34.4	34.3	34.9	5.57	5.52	5.10
WHOLESALE TRADE	286.00	284.00	258.59	40.0	40.0	39.6	7.15	7.10	6.53
RETAIL TRADE	152.00	149.93	144.76	32.0	31.9	32.9	4.75	4.70	4.40
GENERAL MDSE. STORES	106.48	105.53	122.66	23.3	23.4	29.7	4.57	4.51	4.13
BANKING	177.85	179.15	165.44	37.6	37.4	37.6	4.73	4.79	4.40
FOR THE MAJOR MARKETS									
AMARILLO									
MANUFACTURING	277.95	277.38	238.37	40.4	41.4	39.4	6.88	6.70	6.05
DURABLE GOODS	286.42	278.80	267.10	40.8	40.7	41.8	7.02	6.85	6.39
NONDURABLE GOODS	268.13	276.83	209.42	39.9	42.2	37.0	6.72	6.56	5.66
AUSTIN									
MANUFACTURING	226.01	230.23	189.13	41.7	42.4	39.9	5.42	5.43	4.74
DURABLE GOODS	231.42	236.81	190.62	42.0	42.9	40.3	5.51	5.52	4.73
NONDURABLE GOODS	201.50	199.70	182.68	40.3	40.1	37.9	5.00	4.98	4.82
BEAUMONT									
MANUFACTURING	357.98	402.90	391.67	38.7	42.1	41.8	9.25	9.57	9.37
DURABLE GOODS	346.45	350.99	295.27	41.0	41.1	38.8	8.45	8.54	7.61
NONDURABLE GOODS	374.26	459.65	446.31	36.8	43.2	43.5	10.17	10.64	10.26
CORPUS CHRISTI									
MANUFACTURING	305.27	292.92	280.74	39.8	38.9	38.3	7.67	7.53	7.33
DURABLE GOODS	280.09	256.13	204.43	40.3	38.4	34.3	6.95	6.67	5.96
NONDURABLE GOODS	321.93	317.13	328.85	39.5	39.2	40.8	8.15	8.09	8.06
DALLAS/FT. WORTH									
MANUFACTURING	263.41	264.21	228.74	40.4	40.9	39.1	6.52	6.46	5.85
DURABLE GOODS	278.66	278.88	239.55	41.1	41.5	39.4	6.78	6.72	6.08
NONDURABLE GOODS	231.27	234.43	206.75	39.0	39.6	38.5	5.93	5.92	5.37
EL PASO									
MANUFACTURING	204.97	201.89	180.48	38.6	38.9	37.6	5.31	5.19	4.80
DURABLE GOODS	239.98	232.93	248.68	35.5	35.4	40.7	6.76	6.58	6.11
NONDURABLE GOODS	193.25	191.28	157.32	39.6	40.1	36.5	4.88	4.77	4.31
GALVESTON									
MANUFACTURING	445.82	430.14	407.77	43.2	42.8	42.3	10.32	10.05	9.64
DURABLE GOODS	385.42	378.53	327.24	43.6	42.2	40.3	8.84	8.97	8.12
NONDURABLE GOODS	475.76	456.86	441.50	42.9	43.1	43.2	11.09	10.60	10.22
HOUSTON									
MANUFACTURING	355.54	356.16	323.67	43.2	43.7	42.2	8.23	8.15	7.67
DURABLE GOODS	336.05	338.95	289.88	42.7	43.4	40.6	7.87	7.81	7.14
NONDURABLE GOODS	388.96	386.30	379.41	44.1	44.3	44.9	8.82	8.72	8.45
LUBBOCK									
MANUFACTURING	220.32	216.68	193.28	40.5	40.2	40.1	5.44	5.39	4.82
DURABLE GOODS	211.43	212.37	178.64	39.3	39.4	38.5	5.38	5.39	4.64
NONDURABLE GOODS	240.62	226.38	225.49	43.2	42.0	43.7	5.57	5.39	5.16
SAN ANTONIO									
MANUFACTURING	212.34	208.16	177.02	41.8	41.8	38.4	5.08	4.98	4.61
DURABLE GOODS	222.82	216.39	181.16	42.2	42.1	38.3	5.28	5.14	4.73
NONDURABLE GOODS	201.54	199.62	173.70	41.3	41.5	38.6	4.88	4.81	4.50
WACO									
MANUFACTURING	236.93	241.01	214.50	38.4	38.5	39.0	6.17	6.26	5.50
DURABLE GOODS	251.13	257.68	231.57	39.3	40.2	41.5	6.39	6.41	5.58
NONDURABLE GOODS	219.32	221.19	196.02	37.3	36.5	36.3	5.88	6.06	5.40
WICHITA FALLS									
MANUFACTURING	258.73	258.16	226.97	40.3	40.4	40.1	6.42	6.39	5.66
DURABLE GOODS	274.99	273.62	245.37	40.8	40.9	41.1	6.74	6.69	5.97
NONDURABLE GOODS	210.99	210.84	177.57	39.0	38.9	37.7	5.41	5.42	4.71

*Figures cover Production Workers in Manufacturing and Mining industries only and Nonsupervisory Employees in other industry divisions. Earnings' averages include premium pay for overtime, holidays, and for late-shift work. †Preliminary—subject to revisions upon receipt of additional reports.

NONAGRICULTURAL WAGE AND SALARY† ESTIMATES—TEXAS

INDUSTRY	APR.* 1980	MAR.** 1980	APR.** 1979	CHANGE FROM MAR. 1980	CHANGE FROM APR. 1979
‡TOTAL NONAGRICULTURAL EMPLOYMENT	5,754,300	5,742,800	5,543,100	11,500	211,200
MANUFACTURING	1,040,700	1,034,700	1,008,600	6,000	32,100
DURABLE GOODS	615,300	615,100	593,000	200	22,300
LUMBER & WOOD PRODUCTS	36,300	37,000	37,000	— 700	— 700
LOGGING CAMPS, SAWMILLS, PLANING MILLS	7,800	8,200	8,300	— 400	— 500
FURNITURE & FIXTURES	18,100	18,500	18,600	— 400	— 500
STONE, CLAY & GLASS PRODUCTS	44,900	45,600	44,700	— 700	200
CONCRETE, GYPSUM & PLASTER PRODUCTS	19,100	19,500	18,500	— 400	600
PRIMARY METAL INDUSTRIES	47,200	47,100	45,800	100	1,400
FABRICATED METAL PRODUCTS	93,600	94,200	91,000	— 600	2,600
FABRICATED STRUCTURAL METAL PRODUCTS	48,700	49,400	47,700	— 700	1,000
MACHINERY, EXCEPT ELECTRICAL	156,000	155,900	148,600	100	7,400
OIL FIELD MACHINERY	62,300	61,900	58,700	400	3,600
ELECTRIC & ELECTRONIC EQUIPMENT	103,400	103,600	97,400	— 200	6,000
TRANSPORTATION EQUIPMENT	83,400	81,300	80,200	2,100	3,200
AIRCRAFT & PARTS	49,200	48,900	45,100	300	4,100
INSTRUMENTS & RELATED PRODUCTS	19,100	18,900	18,000	200	1,100
MISCELLANEOUS MANUFACTURING INDUSTRIES	13,300	13,000	11,700	300	1,600
NONDURABLE GOODS	425,400	419,600	415,600	5,800	9,800
FOOD AND KINDRED PRODUCTS	96,400	96,900	95,200	— 500	1,200
MEAT PRODUCTS	25,300	25,600	25,100	— 300	200
DAIRY PRODUCTS	5,400	5,300	5,300	100	100
BAKERY PRODUCTS	11,600	11,700	10,800	— 100	800
MALT BEVERAGES	3,600	3,600	3,500	-0-	100
TEXTILE MILL PRODUCTS	6,100	6,200	5,800	— 100	300
APPAREL & OTHER FINISHED TEXTILE PRODUCTS	76,700	76,300	74,600	400	2,100
PAPER & ALLIED PRODUCTS	22,300	22,400	21,800	— 100	500
PRINTING & PUBLISHING	61,600	61,500	58,600	100	3,000
NEWSPAPER, PERIODICALS, BOOKS & MISC. PUBL.	32,800	32,700	31,000	100	1,800
CHEMICALS & ALLIED PRODUCTS	80,900	78,800	78,800	2,100	2,100
PETROLEUM & COAL PRODUCTS	42,700	38,400	42,500	4,300	200
PETROLEUM REFINING	38,800	34,500	38,500	4,300	300
LEATHER & LEATHER PRODUCTS	7,600	7,700	7,500	— 100	100
OTHER NONDURABLE GOODS	31,100	31,400	30,800	— 300	300
TOTAL NONMANUFACTURING	4,713,600	4,708,100	4,534,500	5,500	179,100
MINING	214,400	214,200	193,900	200	20,500
OIL & GAS EXTRACTION	204,600	204,400	184,900	200	19,700
METAL & COAL & NONMET. MRNLS., EXC. FUEL	9,800	9,800	9,000	-0-	800
CONSTRUCTION	435,000	432,500	409,000	2,500	26,000
TRANSPORTATION & PUBLIC UTILITIES	361,200	360,500	346,100	700	15,100
RAILROAD TRANSPORTATION	31,400	31,600	30,900	— 200	500
TRANSPORTATION, EXCEPT RAILROADS	180,800	180,400	171,500	400	9,300
TRANSPORTATION BY AIR	36,000	35,900	33,000	100	3,000
COMMUNICATION, EXC. U.S. POSTAL SERVICE	79,400	79,300	79,200	100	200
ELECTRIC, GAS & SANITARY SERVICES	69,600	69,200	64,500	400	5,100
ELECTRIC SERVICES	37,600	37,300	34,000	300	3,600
GAS PRODUCTION & DISTRIBUTION	27,300	27,200	26,400	100	900
WHOLESALE & RETAIL TRADE	1,388,900	1,383,700	1,361,400	5,200	27,500
WHOLESALE TRADE	406,400	405,800	393,400	600	13,000
RETAIL TRADE	982,500	977,900	968,000	4,600	14,500
BUILDING MATERIALS & GARDEN SUPPLIES	45,900	45,000	44,900	900	1,000
GENERAL MERCHANDISE STORES	140,100	140,900	140,200	— 800	— 100
FOOD STORES	160,900	162,400	158,500	— 1,500	2,400
AUTOMOTIVE DEALERS & SERVICE STATIONS	122,500	122,900	127,200	— 400	— 4,700
APPAREL & ACCESSORY STORES	75,400	74,800	73,300	600	2,100
OTHER RETAIL TRADE	437,700	431,900	423,900	5,800	13,800
FINANCE, INSURANCE & REAL ESTATE	325,500	325,400	310,100	100	15,400
BANKING	86,000	85,800	80,300	200	5,700
INSURANCE CARRIERS, AGENTS & BROKERS	113,300	113,000	109,000	300	4,300
OTHER FINANCE, INSURANCE & REAL ESTATE	126,200	126,600	120,800	— 400	5,400
SERVICES	994,000	995,800	950,500	— 1,800	43,500
HOTELS & OTHER LODGING PLACES	56,600	57,600	57,400	— 1,000	— 800
PERSONAL SERVICES	63,400	63,400	65,000	-0-	— 1,600
BUSINESS & REPAIR SERVICES	254,200	254,400	238,600	— 200	15,600
AMUSEMENT, INCLUDING MOTION PICTURES	45,700	45,200	42,200	500	3,500
HEALTH SERVICES	266,000	266,400	256,100	— 400	9,900
EDUCATIONAL SERVICES	52,900	52,900	49,900	-0-	3,000
OTHER SERVICES & MISCELLANEOUS	255,200	255,900	241,300	— 700	13,900
TOTAL GOVERNMENT	994,600	996,000	963,500	— 1,400	31,100
TOTAL FEDERAL GOVERNMENT	163,600	162,700	163,200	900	400
TOTAL STATE GOVERNMENT	197,400	198,300	203,600	— 900	— 6,200
TOTAL LOCAL GOVERNMENT	633,600	635,000	596,700	— 1,400	36,900
TOTAL MANUFACTURING PRODUCTION WORKERS	716,700	712,900	702,100	3,800	14,600
DURABLE GOODS	416,500	417,300	405,800	— 800	10,700
NONDURABLE GOODS	300,200	295,600	296,300	4,600	3,900

†Estimated number of nonagricultural jobs in Texas without reference to place of residence of workers. ‡Estimates of TEC in cooperation with Bureau of Labor Statistics and Employment and Training Administration, U.S. Department of Labor. *Preliminary—subject to revision. **Revised.

sonal farmworkers was 63,000 at mid-month, slightly below the April 1979 figure of 64,500.

Cotton activities employed 12,500 seasonal workers during the month compared to 12,400 a year ago. The dryland cotton crop in South Texas was reported to be in need of rain. Vegetable activities provided work for 13,850 seasonal employees as several different vegetables were being harvested in the Lower Rio Grande Valley. Grain sorghum planting was ahead of schedule as seasonal employment in feed and grain activities was 18,400 compared to 19,600 last year. Warm weather helped to improve pastures, but rainfall was needed across most of the State.

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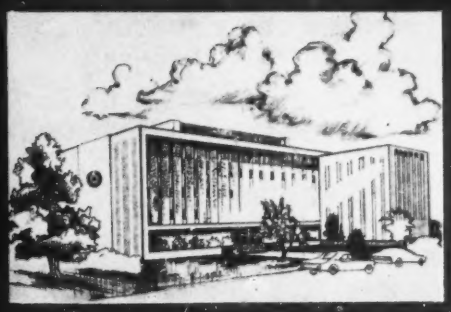


TEXAS LABOR MARKET REVIEW

T.E.C. BUILDING JUNE 1980 AUSTIN, TEXAS 78778

STATE LABOR FORCE DECLINES

The State's civilian labor force dwindled slightly from mid-April to mid-May as total employment fell with more significant layoffs due to economic conditions being reported. Total unemployment rose by nearly 16,000 over the period as the number of initial claims for unemployment insurance began to climb.

Employment in construction was beginning to waver as more and more job completions were being followed by layoffs rather than new job starts. Heavy construction, which had been stable until recently, began to feel the effects of the current economic pinch.

Claims for unemployment insurance were increasing as more initial claims were taken during May than for any month since January 1979. The initial claims count for May was the highest in recent history for that month. The State's unemployment rate eased upward from 4.8 percent in April to 5.0 percent for May. The year-ago rate was 4.2 percent. The unemployment rate for the United States was 7.0 percent for May compared to 6.6 percent a month ago and 5.2 percent a year ago. The seasonally adjusted rate for Texas was 5.4 percent and 7.8 percent for the Nation.

WAGE AND SALARY CLIMBS SLOWLY

The number of nonagricultural wage and salary jobs in Texas rose for the fourth consecutive month as gains were reported in both manufacturing and nonmanufacturing. During this period, from January to May, total wage and salary employment advanced 0.9 percent. Although wage and salary employment has shown a steady growth, the rate of increase has been much less than in previous years. From January to May 1979 total wage and salary employment rose 3.3 percent, while for the same period in 1978 it rose 3.9 percent and in 1977 it was up 3.1 percent. The advance posted this year was well below the rise recorded during the recession of 1975.

The diversity of the State's economy has been an asset during recessionary periods. Although the growth rates have declined during economic downturns, wage and salary employment has, nevertheless, been able to post an advance. As specific industries have been hurt by employment losses, other segments of the labor force have been able to absorb much of the surplus labor created by layoffs.

The manufacturing sector of nonagricultural wage and salary employment eased up over the month largely due

SUMMARY OF LABOR FORCE† ESTIMATES

	TOTAL EMPLOYMENT‡			TOTAL UNEMPLOYMENT			UNEMPLOYED AS % OF LABOR FORCE		
	MAY* 1980	APRIL** 1980	MAY** 1979	MAY* 1980	APRIL** 1980	MAY** 1979	MAY* 1980	APRIL** 1980	MAY** 1979
STATEWIDE	5,967,400	5,988,200	5,828,200	314,500	298,800	257,500	5.0	4.8	4.2
ABILENE	63,710	63,280	62,530	2,320	2,190	1,930	3.5	3.3	3.0
AMARILLO	83,670	84,330	83,490	3,450	3,330	2,840	4.0	3.8	3.3
AUSTIN	240,000	241,900	234,500	8,750	8,400	6,700	3.5	3.4	2.8
BEAUMONT-PORT ARTHUR-ORANGE	148,200	149,100	149,650	10,850	11,050	10,150	6.8	6.9	6.4
BROWNSVILLE-HARLINGEN-SAN BENITO	64,930	65,220	64,730	7,320	7,670	6,480	10.1	10.5	9.1
BRYAN-COLLEGE STATION	38,690	39,560	38,500	1,910	1,310	940	4.7	3.2	2.4
CORPUS CHRISTI	132,600	133,800	132,400	8,000	7,700	6,400	5.7	5.4	4.6
DALLAS-FORT WORTH	1,440,000	1,446,000	1,380,500	64,300	58,100	49,100	4.3	3.9	3.4
EL PASO	153,900	155,250	150,200	14,950	14,550	13,350	8.9	8.6	8.2
GALVESTON-TEXAS CITY	78,940	77,440	74,060	4,770	4,930	4,540	5.7	6.0	5.8
HOUSTON	1,375,000	1,379,800	1,334,300	57,200	55,900	47,400	4.0	3.9	3.4
KILLEEN-TEMPLE	59,560	60,000	59,020	3,520	3,530	2,980	5.6	5.6	4.8
LAREDO	30,360	30,420	29,350	3,540	3,920	3,680	10.4	11.4	11.1
LONGVIEW—MARSHALL	61,270	61,760	61,580	4,170	4,080	3,190	6.4	6.2	4.9
LUBBOCK	96,340	97,390	94,410	4,090	3,900	3,700	4.1	3.9	3.8
MCALLEN-PHARR-EDINBURG	78,420	78,880	75,720	10,310	10,080	9,480	11.6	11.3	11.1
MIDLAND	45,750	45,430	42,880	1,980	1,570	1,290	4.1	3.3	2.9
ODESSA	58,490	58,740	56,100	2,140	2,110	2,010	3.5	3.5	3.5
SAN ANGELO	41,130	41,420	39,350	1,340	1,460	1,240	3.2	3.4	3.1
SAN ANTONIO	385,650	387,450	377,150	24,600	24,300	23,300	6.0	5.9	5.8
SHERMAN-DENISON	37,120	37,010	37,210	2,250	2,160	1,760	5.7	5.5	4.5
TEXARKANA	43,600	43,430	44,920	4,180	4,040	3,630	8.7	8.5	7.5
TYLER	59,280	60,330	60,280	4,020	3,140	2,420	6.4	4.9	3.9
WACO	74,880	75,640	73,350	5,170	3,810	3,130	6.5	4.8	4.1
WICHITA FALLS	56,690	57,150	55,990	2,800	2,220	2,010	4.7	3.7	3.5

†Sum of estimated number of total employed and unemployed workers residing in the specified areas.
‡Includes resident wage and salary workers, self-employed, unpaid family workers and domestics in private households, agricultural workers and workers involved in labor-management disputes.
*Preliminary—subject to revision. **Revised.

TEXAS LABOR MARKET REVIEW
Official Publication of
TEXAS EMPLOYMENT COMMISSION
NOLAN F. WARD ..... Chairman
KEN CLAPP ..... Commissioner
A.C. SHIRLEY ..... Commissioner
ERNIE W. TULLIS, Administrator

Published Monthly at the TEC Building, Austin, Texas
Economic Research and Analysis Department

to the settlement of a labor-management dispute in the petroleum and coal products segment of nondurable goods. The nondurable goods sector as a whole was up substantially as several industries recorded minor gains and petroleum and coal products reported a large increase. A labor-management dispute which began in January in the petroleum refining portion of petroleum and coal products was finally ended and employment in the industry surged as the workers returned to their jobs.

Printing and publishing advanced moderately as the newspapers, periodicals, books and miscellaneous publishing segment of the industry provided most of the gain. Another nondurable goods industry which increased was apparel and other finished textile products. An advance of over 500 was noted in men's and boys' suits, coats and furnishings, but was partially offset by small losses in other segments of the industry.

Most of the industries in the durable goods sector declined from April to May. Many of the products of these industries are used in the construction industry and as building activity drops so does the employment in these industries. Lumber and wood products suffered the most pronounced decline over the month as a downturn in building starts took place. Furniture and fixtures and stone, clay and glass, also experienced employment reductions as construction activity declined. Fabricated metal products benefitted from a small gain, but the rise was the result of the settlement of a labor-management dispute rather than an increase in business activity.

Another durable goods industry affected by a labor-management dispute was electric and electronic equipment. This industry suffered the largest loss from a month ago of any manufacturing industry as it was hit with layoffs plus a labor-management dispute. Primary metal products decreased moderately with most of the drop occurring in the iron and steel foundry sector. Minor cutbacks were recorded in transportation equipment and miscellaneous manufacturing industries. Firms producing motor vehicles and motor vehicle equipment and the ship and boat building and repairing sector experienced the largest decreases in transportation equipment.

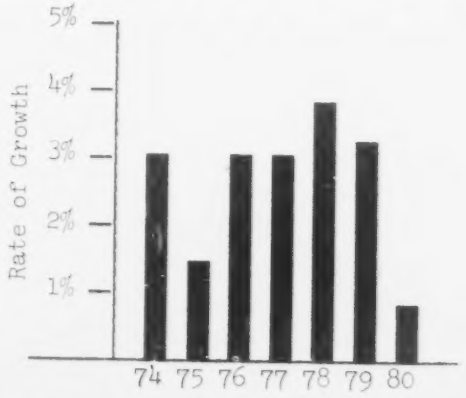
Employment among the nonmanufacturing industries moved up slightly over the month with the largest gain reported in mining. The continued high demand for petroleum products as well as the settlement of a labor-management dispute in the petroleum refining segment of manufacturing led to increased employment in this sector. Other gains in nonmanufacturing were reported in government; finance, insurance and real estate; and trade. Federal and local government began to hire seasonal workers for the summer months and replacements for regular workers on vacation. The only portion of government to decline was state government. The end of the spring semester at state colleges and universities was chiefly responsible for the drop.

Finance, insurance and real estate was up moderately with gains scattered throughout all segments of the industry. The single most significant increase, however, was noted in the real estate portion. Summer is the most active season for home sales as many buyers try to close and move into their new homes before the new school year begins. The gain in trade was small and occurred solely in the retail portion of the industry. Minor gains were noted in several segments, chiefly food stores and apparel and accessory stores, while a moderate loss was reported in general merchandise stores.

Construction underwent the largest reduction from April to May as substantial declines were seen in heavy construction and special trade construction. Layoffs followed job completions during the month and new starts were down from previous months. Services also realized a decline as sizeable losses were noted in personal services, business and repair services, and educational services. The largest drop in business and repair services occurred in auto repair, services and garages, where decreases were widespread. The cutback in educational services was a normal seasonal reduction which follows the end of the school year.

Transportation and public utilities fell only minutely from April to May with all of the decrease evident in transportation, except railroad. Water transportation was the hardest hit by employment losses as business activity dropped. The decrease in water transportation was nearly offset entirely by a rise in electric, gas and sanitary services, where modest gains were posted in electric services and in gas production and distribution.

Nonagricultural Wage and Salary Employment Rate of Growth from Jan. to May for Years 1974-1980



AVERAGE HOURLY EARNINGS CLIMB

An average production worker earned $7.08 per hour and worked a 40.9-hour week during the month, making the average weekly earnings $289.57. Both average hourly earnings (AHE) and average weekly hours (AWH) were up from April to May, despite some comparatively large decreases in a few of the industries.

Malt beverages saw its AHE figure fall by 44 cents as

HOURS AND EARNINGS IN TEXAS*

SOURCE: TEXAS EMPLOYMENT COMMISSION IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS, U.S. DEPARTMENT OF LABOR

	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	MAY† 1980	APR.† 1980	MAY 1979	MAY† 1980	APR. 1980	MAY 1979	MAY† 1980	APR. 1980	MAY 1979
FOR TEXAS									
MANUFACTURING—TOTAL	$289.57	$286.01	$262.22	40.9	40.8	41.1	$ 7.08	$ 7.01	$ 6.38
DURABLE GOODS	284.78	282.90	262.50	40.8	41.0	41.6	6.98	6.90	6.31
LUMBER & WOOD PRODUCTS	204.82	202.16	197.20	38.0	38.0	40.0	5.39	5.32	4.93
FURNITURE & FIXTURES	171.12	172.79	179.25	36.8	37.4	40.1	4.65	4.62	4.47
STONE, CLAY & GLASS PRODS	269.69	272.21	257.68	41.3	42.6	43.6	6.53	6.39	5.91
PRIMARY METAL INDUSTRIES	363.13	362.85	335.02	41.5	41.9	42.3	8.75	8.66	7.92
FABRICATED METAL PRODUCTS	300.77	299.59	270.93	41.6	41.9	41.3	7.23	7.15	6.56
MACHINERY, EXCEPT ELEC.	299.06	297.93	270.67	42.3	42.2	41.5	7.07	7.06	6.46
OIL FIELD MACHINERY	345.35	353.10	317.77	42.9	43.7	43.0	8.05	8.08	7.39
ELEC. & ELECTRONIC EQUIP.	239.99	239.95	220.58	40.2	40.6	41.0	5.97	5.91	5.38
TRANSPORTATION EQUIPMENT	345.42	340.25	319.37	40.4	40.7	42.3	8.55	8.36	7.55
AIRCRAFT & PARTS	383.30	363.85	351.27	42.4	41.3	43.1	9.04	8.81	8.15
INSTR. & RELATED PRODUCTS	213.19	205.70	200.49	37.8	37.4	39.7	5.64	5.50	5.05
MISC. MFG. INDUSTRIES	195.97	193.55	185.73	38.2	38.1	39.1	5.13	5.08	4.75
NONDURABLE GOODS	296.02	290.39	261.39	41.0	40.5	40.4	7.22	7.17	6.47
FOOD & KINDRED PRODUCTS	261.46	250.67	231.69	41.9	40.3	41.3	6.24	6.22	5.61
MEAT PRODUCTS	267.73	248.69	230.93	42.7	39.6	40.8	6.27	6.28	5.66
MALT BEVERAGES	505.11	509.48	473.82	51.7	49.9	44.2	9.77	10.21	10.72
TEXTILE MILL PRODUCTS	206.91	216.48	178.69	42.4	44.0	39.1	4.88	4.92	4.57
APPRL. & OTHER TEXT PROD.	151.15	148.23	126.44	37.6	36.6	36.0	4.02	4.05	3.79
PAPER & ALLIED PRODUCTS	308.37	310.13	278.05	42.3	42.6	41.5	7.29	7.28	6.70
PRINTING & PUBLISHING	251.22	253.62	225.79	39.5	39.2	39.2	6.36	6.47	5.76
CHEMICALS & ALLIED PRODS.	451.97	453.46	416.02	42.8	42.3	43.2	10.56	10.72	9.63
PETROLEUM & COAL PRODUCTS	513.04	510.67	418.70	43.7	44.6	42.9	11.74	11.45	9.76
PETROLEUM REFINING	537.86	538.32	438.44	43.8	44.6	42.9	12.28	12.07	10.22
LEATHER & LEATHER PRODUCTS	149.37	160.06	143.25	38.3	38.2	37.5	3.90	4.19	3.82
OTHER NONDURABLE GOODS	246.33	255.35	237.11	41.4	42.7	42.8	5.95	5.98	5.54
NONMANUFACTURING									
MINING	381.97	386.51	321.35	45.8	46.4	43.9	8.34	8.33	7.32
OIL & GAS EXTRACTION	385.18	389.76	323.54	45.6	46.4	43.9	8.41	8.40	7.37
METAL & COAL & NONMET. MRNLS., EXC. FUEL	312.06	325.24	289.10	44.9	47.0	45.6	6.95	6.92	6.34
COMMUNICATIONS, EXCEPT U.S. POSTAL SERV.	317.05	316.65	293.25	40.7	40.7	40.9	7.79	7.78	7.17
ELEC., GAS & SAN. SVCS.	328.72	333.48	299.04	41.4	42.0	42.0	7.94	7.94	7.12
WHOLESALE & RETAIL TRADE	190.45	191.26	177.80	35.4	34.4	35.0	5.38	5.56	5.08
WHOLESALE TRADE	284.09	286.63	258.15	39.9	40.2	39.9	7.12	7.13	6.47
RETAIL TRADE	151.87	152.15	144.76	33.6	32.1	32.9	4.52	4.74	4.40
GENERAL MDSE. STORES	108.77	105.99	121.54	23.8	23.5	29.5	4.57	4.51	4.12
BANKING	179.35	178.32	162.75	37.6	37.7	37.5	4.77	4.73	4.34
FOR THE MAJOR MARKETS									
AMARILLO									
MANUFACTURING	283.50	275.49	240.69	40.5	40.1	39.2	7.00	6.87	6.14
DURABLE GOODS	291.72	286.42	266.43	40.8	40.8	41.5	7.15	7.02	6.42
NONDURABLE GOODS	274.69	264.77	214.76	40.1	39.4	36.9	6.85	6.72	5.82
AUSTIN									
MANUFACTURING	224.11	224.13	204.26	40.6	41.2	41.6	5.52	5.44	4.91
DURABLE GOODS	228.52	229.35	206.15	41.1	41.7	41.9	5.56	5.50	4.92
NONDURABLE GOODS	200.49	200.97	193.43	37.9	39.1	39.8	5.29	5.14	4.86
BEAUMONT									
MANUFACTURING	439.81	368.99	382.97	42.7	38.8	41.9	10.30	9.51	9.14
DURABLE GOODS	324.86	354.35	310.78	38.4	41.3	40.1	8.46	8.58	7.75
NONDURABLE GOODS	512.11	380.21	423.85	45.4	36.7	42.9	11.28	10.36	9.88
CORPUS CHRISTI									
MANUFACTURING	306.32	308.48	306.39	40.2	39.6	41.8	7.62	7.79	7.33
DURABLE GOODS	260.91	279.09	208.70	38.2	39.7	34.9	6.83	7.03	5.98
NONDURABLE GOODS	336.15	327.46	368.21	41.5	39.5	46.2	8.10	8.29	7.97
DALLAS/FT. WORTH									
MANUFACTURING	261.70	261.70	241.35	40.2	40.2	40.7	6.51	6.51	5.93
DURABLE GOODS	275.81	276.62	255.64	40.5	40.8	41.5	6.81	6.78	6.16
NONDURABLE GOODS	231.47	231.27	212.86	39.5	39.0	39.2	5.86	5.93	5.43
EL PASO									
MANUFACTURING	209.87	205.92	190.80	39.9	39.0	40.0	5.26	5.28	4.77
DURABLE GOODS	245.69	238.30	245.37	35.3	35.2	41.8	6.96	6.77	5.87
NONDURABLE GOODS	198.72	195.05	172.18	41.4	40.3	39.4	4.80	4.84	4.37
GALVESTON									
MANUFACTURING	406.69	436.35	408.64	39.6	42.2	42.7	10.27	10.34	9.57
DURABLE GOODS	394.66	388.06	350.60	43.9	43.7	42.6	8.99	8.88	8.23
NONDURABLE GOODS	412.30	460.24	431.70	38.0	41.5	42.7	10.85	11.09	10.11
HOUSTON									
MANUFACTURING	357.73	358.52	327.56	43.1	43.3	43.1	8.30	8.28	7.60
DURABLE GOODS	335.62	337.19	307.15	42.7	42.9	42.6	7.86	7.86	7.21
NONDURABLE GOODS	394.20	392.91	361.30	43.8	43.9	43.9	9.00	8.95	8.23
LUBBOCK									
MANUFACTURING	219.11	215.72	198.85	40.5	39.8	41.6	5.41	5.42	4.78
DURABLE GOODS	212.22	206.75	186.13	39.3	38.5	40.2	5.40	5.37	4.63
NONDURABLE GOODS	235.01	236.26	226.51	43.2	42.8	44.5	5.44	5.52	5.09
SAN ANTONIO									
MANUFACTURING	211.14	210.50	186.60	41.4	41.6	40.0	5.10	5.06	4.67
DURABLE GOODS	219.37	221.76	194.32	40.7	42.0	40.4	5.39	5.28	4.81
NONDURABLE GOODS	203.83	198.51	180.24	42.2	41.1	39.7	4.83	4.83	4.54
WACO									
MANUFACTURING	241.80	237.08	221.82	39.0	38.3	39.4	6.20	6.19	5.63
DURABLE GOODS	251.77	248.82	231.49	39.4	39.0	40.9	6.39	6.38	5.66
NONDURABLE GOODS	229.85	221.78	211.30	38.5	37.4	37.8	5.97	5.93	5.59
WICHITA FALLS									
MANUFACTURING	246.85	257.28	232.13	39.0	40.2	40.3	6.33	6.40	5.76
DURABLE GOODS	257.52	273.50	249.29	38.9	40.7	40.8	6.62	6.72	6.11
NONDURABLE GOODS	216.31	210.99	183.52	39.4	39.0	38.8	5.49	5.41	4.73

*Figures cover Production Workers in Manufacturing and Mining industries only and Nonsupervisory Employees in other industry divisions. Earnings averages include premium pay for overtime, holidays, and for late-shift work. †Preliminary—subject to revisions upon receipt of additional reports.

NONAGRICULTURAL WAGE AND SALARY† ESTIMATES—TEXAS

INDUSTRY	MAY* 1980	APRIL** 1980	MAY** 1979	CHANGE FROM APR. 1980	CHANGE FROM MAY 1979
‡TOTAL NONAGRICULTURAL EMPLOYMENT	5,762,200	5,758,900	5,582,700	3,300	179,500
MANUFACTURING	1,042,600	1,041,800	1,017,600	800	25,000
DURABLE GOODS	610,900	616,000	599,000	- 5,100	11,900
LUMBER & WOOD PRODUCTS	34,500	35,700	37,300	- 1,200	- 2,800
LOGGING CAMPS, SAWMILLS, PLANING MILLS	7,300	7,600	8,500	- 300	- 1,200
FURNITURE & FIXTURES	17,400	18,200	18,900	- 800	- 1,500
STONE, CLAY & GLASS PRODUCTS	44,100	44,900	45,400	- 800	- 1,300
CONCRETE, GYPSUM & PLASTER PRODUCTS	19,000	19,100	18,600	- 100	400
PRIMARY METAL INDUSTRIES	46,400	47,200	46,500	- 800	- 100
FABRICATED METAL PRODUCTS	93,900	93,600	91,400	300	2,500
FABRICATED STRUCTURAL METAL PRODUCTS	49,000	48,600	47,800	400	1,200
MACHINERY, EXCEPT ELECTRICAL	157,300	157,100	150,000	200	7,300
OIL FIELD MACHINERY	63,000	62,300	58,800	700	4,200
ELECTRIC & ELECTRONIC EQUIPMENT	102,500	104,000	98,500	- 1,500	4,000
TRANSPORTATION EQUIPMENT	82,700	83,000	81,000	- 300	1,700
AIRCRAFT & PARTS	49,300	49,100	45,500	200	3,800
INSTRUMENTS & RELATED PRODUCTS	19,100	19,000	18,200	100	900
MISCELLANEOUS MANUFACTURING INDUSTRIES	13,000	13,300	11,800	- 300	1,200
NONDURABLE GOODS	431,700	425,800	418,600	5,900	13,100
FOOD AND KINDRED PRODUCTS	96,200	96,000	96,100	200	100
MEAT PRODUCTS	25,300	25,300	25,200	-0-	100
DAIRY PRODUCTS	5,400	5,400	5,500	-0-	- 100
BAKERY PRODUCTS	11,700	11,600	10,800	100	900
MALT BEVERAGES	3,700	3,600	3,500	100	200
TEXTILE MILL PRODUCTS	6,000	6,100	5,800	- 100	200
APPAREL & OTHER FINISHED TEXTILE PRODUCTS	76,900	76,600	75,200	300	1,700
PAPER & ALLIED PRODUCTS	22,300	22,300	21,900	-0-	400
PRINTING & PUBLISHING	62,100	61,700	58,800	400	3,300
NEWSPAPER, PERIODICALS, BOOKS & MISC. PUBL.	33,200	33,000	31,100	200	2,100
CHEMICALS & ALLIED PRODUCTS	81,700	81,700	79,700	-0-	2,000
PETROLEUM & COAL PRODUCTS	48,200	42,700	42,500	5,500	5,700
PETROLEUM REFINING	44,400	38,800	38,600	5,600	5,800
LEATHER & LEATHER PRODUCTS	7,700	7,700	7,600	-0-	100
OTHER NONDURABLE GOODS	30,600	31,000	31,000	- 400	- 400
TOTAL NONMANUFACTURING	4,719,600	4,717,100	4,565,100	2,500	154,500
MINING	217,800	215,500	195,500	2,300	22,300
OIL & GAS EXTRACTION	208,100	205,700	186,500	2,400	21,600
METAL & COAL & NONMET. MRNLS., EXC. FUEL	9,700	9,800	9,000	- 100	700
CONSTRUCTION	433,000	435,600	417,400	- 2,600	15,600
TRANSPORTATION & PUBLIC UTILITIES	361,900	362,000	349,400	- 100	12,500
RAILROAD TRANSPORTATION	31,900	31,900	31,200	-0-	700
TRANSPORTATION, EXCEPT RAILROADS	180,000	180,800	173,500	- 800	6,500
TRANSPORTATION BY AIR	36,000	36,000	33,500	-0-	2,500
COMMUNICATION, EXC. U.S. POSTAL SERVICE	79,700	79,700	79,500	-0-	200
ELECTRIC, GAS & SANITARY SERVICES	70,300	69,600	65,200	700	5,100
ELECTRIC SERVICES	37,900	37,500	34,300	400	3,600
GAS PRODUCTION & DISTRIBUTION	27,600	27,300	26,600	300	1,000
WHOLESALE & RETAIL TRADE	1,387,100	1,385,900	1,369,600	1,200	17,500
WHOLESALE TRADE	406,400	406,400	395,300	-0-	11,100
RETAIL TRADE	980,700	979,500	974,300	1,200	6,400
BUILDING MATERIALS & GARDEN SUPPLIES	46,000	46,100	45,300	- 100	700
GENERAL MERCHANDISE STORES	139,400	140,900	140,800	- 1,500	- 1,400
FOOD STORES	162,700	161,400	159,200	1,300	3,500
AUTOMOTIVE DEALERS & SERVICE STATIONS	123,200	123,000	127,400	200	- 4,200
APPAREL & ACCESSORY STORES	76,000	75,100	72,800	900	3,200
OTHER RETAIL TRADE	433,400	433,000	428,800	400	4,600
FINANCE, INSURANCE & REAL ESTATE	328,200	326,400	312,700	1,800	15,500
BANKING	86,500	86,000	81,100	500	5,400
INSURANCE CARRIERS, AGENTS & BROKERS	114,000	113,600	109,500	400	4,500
OTHER FINANCE, INSURANCE & REAL ESTATE	127,700	126,800	122,100	900	5,600
SERVICES	996,000	998,000	956,800	- 2,000	39,200
HOTELS & OTHER LODGING PLACES	57,900	56,700	57,700	1,200	200
PERSONAL SERVICES	61,400	63,500	62,600	- 2,100	- 1,200
BUSINESS & REPAIR SERVICES	253,800	255,300	243,600	- 1,500	10,200
AMUSEMENT, INCLUDING MOTION PICTURES	47,200	46,500	44,300	700	2,900
HEALTH SERVICES	266,300	266,300	256,500	-0-	9,800
EDUCATIONAL SERVICES	52,100	52,700	48,800	- 600	3,300
OTHER SERVICES & MISCELLANEOUS	257,300	257,000	243,300	300	14,000
TOTAL GOVERNMENT	995,600	993,700	963,700	1,900	31,900
TOTAL FEDERAL GOVERNMENT	164,500	163,400	164,300	1,100	200
TOTAL STATE GOVERNMENT	197,100	197,800	202,100	- 700	- 5,000
TOTAL LOCAL GOVERNMENT	634,000	632,500	597,300	1,500	36,700
TOTAL MANUFACTURING PRODUCTION WORKERS	719,600	718,400	708,300	1,200	11,300
DURABLE GOODS	413,900	417,700	409,800	- 3,800	4,100
NONDURABLE GOODS	305,700	300,700	298,500	5,000	7,200

†Estimated number of nonagricultural jobs in Texas without reference to place of residence of workers. ‡Estimates of TEC in cooperation with Bureau of Labor Statistics and Employment and Training Administration, U.S. Department of Labor. *Preliminary—subject to revision. **Revised.

overtime was cut back and some entry-level workers were hired in two of the larger firms. Retail trade realized a drop of 22 cents as business reductions in building materials and garden supplies, food stores, and miscellaneous retail stores were felt. Fewer overtime hours worked caused declines in AHE in leather and leather products, chemicals and allied products, and printing and publishing.

In contrast to the above industries, additional overtime led to gains in AHE in stone, clay and glass products and transportation equipment. The concrete, gypsum and plaster products segment of stone, clay and glass products was primarily responsible for the advance in earnings. Aircraft and parts was the chief beneficiary of the rise in transportation equipment.

A drop in AWH was recorded in petroleum and coal products, while earnings rose. The changes in AHE and AWH were attributed to the settlement of a labor-management dispute in the petroleum refining segment.

FARM EMPLOYMENT CONTINUES GROWTH

Employment in agriculture rose from 191,300 at mid-April to 199,500 at mid-May as farm activity increased with the spring weather. Seasonal farmworkers totaled 71,500 at mid-May, down from 73,500 for the same period last year.

Cotton farmers on the Plains were delaying planting until the soil warmed as cotton activities employed 15,810 workers this year compared to 15,920 one year ago. Seasonal employment in vegetable activities was down from 16,730 a year ago to 15,240 at mid-month. Various vegetables were still being harvested in the Lower Rio Grande Valley and in the Rio Grande Plains.

Feed and grain employment fell from 22,560 in May 1979 to 22,240 this year. Grain sorghum planting continued to progress. Pecan trees reached full bloom across most of the State, while spring rains proved to be good for pastures.

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TEXAS LABOR MARKET REVIEW

T.E.C. BUILDING JULY 1980 AUSTIN, TEXAS 78778

STATEWIDE LABOR FORCE CLIMBS

A gain of over two percent was recorded in the State's civilian labor force from mid-May to mid-June. Increases were evident in both total employment and total unemployment, although the rate of increase was much greater on the unemployment side. The increase in employment, however, was sufficient to lift total employment in Texas to its highest level this year.

The primary reason that both employment and unemployment advanced was the influx of students into the job market following the end of the spring semester. Much of the rise in employment was due to the hiring of workers for the summer. At the same time, many more who entered the labor force to find summer work did not find jobs and contributed to the upturn in unemployment. Total employment rose by 76,500 from May to June as most segments of the work force reported gains. Those portions of the economy which involve outdoor work, such as construction and some services industries, experienced the most substantial increases. While employment was climbing by thousands, unemployment was also advancing. Total unemployment in Texas rose 71,000, or 22.6 percent, over the month. As the number of unemployed persons rose, so did the unemployment rate—from 5.0 percent at mid-May to 6.0 percent at mid-June. The June 1979 rate for the State was 4.8 percent. The National unemployment rate also rose, from 7.0 percent in May to 7.8 percent in June. The seasonally adjusted unemployment rate for June was 5.5 percent for the State and 7.7 percent for the Nation.

WAGE AND SALARY EMPLOYMENT UP

A moderate upturn was noted in total nonagricultural wage and salary employment from May to June. Almost every major industry division advanced as government was the only division to post a decline. Government's loss, however, was considerable. State and local educational institutions were responsible for the decrease as the spring semester ended and employment at these institutions plunged. Administrative agencies in state and local government reported employment gains due to the hiring of summer workers, but these increases were nowhere near being large enough to offset the losses in education.

Manufacturing enjoyed a moderate upswing from a month ago with all of the advance centered in the nondurable goods sector. Petroleum and coal products continued to climb as a result of workers returning to their jobs following a lengthy labor-management dispute in the petroleum refining segment of the industry. The upturn in petroleum and coal products was the most substantial gain recorded in manufacturing from May to June. Chemicals and allied products was also affected by the labor-management dis-

SUMMARY OF LABOR FORCE† ESTIMATES

	TOTAL EMPLOYMENT‡			TOTAL UNEMPLOYMENT			UNEMPLOYED AS % OF LABOR FORCE		
	JUNE* 1980	MAY** 1980	JUNE** 1979	JUNE* 1980	MAY** 1980	JUNE** 1979	JUNE* 1980	MAY** 1980	JUNE** 1979
STATEWIDE	6,043,900	5,967,400	5,986,100	385,500	314,500	303,300	6.0	5.0	4.8
ABILENE	64,500	63,720	64,020	2,920	2,330	2,060	4.3	3.5	3.1
AMARILLO	84,550	83,840	80,340	4,230	3,460	3,520	4.8	4.0	4.0
AUSTIN	240,900	240,200	237,500	10,150	8,800	8,700	4.0	3.5	3.5
BEAUMONT-PORT ARTHUR-ORANGE	148,550	147,600	153,550	13,050	10,850	11,350	8.1	6.8	6.9
BROWNSVILLE-HARLINGEN-SAN BENITO	65,390	64,950	65,260	8,740	7,340	7,340	11.8	10.2	10.1
BRYAN-COLLEGE STATION	37,210	38,700	39,060	1,760	1,910	1,560	4.5	4.7	3.8
CORPUS CHRISTI	132,900	133,000	135,250	9,850	8,050	8,300	6.9	5.7	5.8
DALLAS-FORT WORTH	1,462,200	1,440,000	1,421,300	81,100	64,400	59,400	5.3	4.3	4.0
EL PASO	155,900	154,300	155,100	17,350	14,900	15,400	10.0	8.8	9.0
GALVESTON-TEXAS CITY	79,460	77,730	76,680	6,030	4,750	5,100	7.1	5.8	6.2
HOUSTON	1,393,500	1,374,600	1,374,700	70,600	57,300	56,200	4.8	4.0	3.9
KILLEEN-TEMPLE	60,300	59,600	60,950	4,110	3,530	3,260	6.4	5.6	5.1
LAREDO	31,610	30,370	29,490	4,120	3,540	3,970	11.5	10.4	11.9
LONGVIEW-MARSHALL	62,120	61,290	63,300	5,070	4,180	3,650	7.5	6.4	5.5
LUBBOCK	94,950	96,710	95,150	5,050	4,110	4,300	5.1	4.1	4.3
MCALLEN-PHARR-EDINBURG	78,240	78,440	75,980	11,820	10,310	10,100	13.1	11.6	11.7
MIDLAND	47,340	45,730	44,810	2,490	2,000	1,750	5.0	4.2	3.8
ODESSA	59,720	58,510	57,730	2,930	2,150	2,530	4.7	3.5	4.2
SAN ANGELO	41,490	41,200	40,520	1,790	1,350	1,420	4.1	3.2	3.4
SAN ANTONIO	391,100	385,500	386,300	34,950	24,700	27,900	8.2	6.0	6.7
SHERMAN-DENISON	37,650	37,060	38,630	2,760	2,240	1,970	6.8	5.7	4.9
TEXARKANA	43,900	43,560	46,200	5,310	4,200	3,890	10.8	8.8	7.8
TYLER	58,860	59,300	61,220	4,710	4,020	2,960	7.4	6.3	4.6
WACO	74,920	75,050	74,830	4,990	5,170	3,680	6.2	6.4	4.7
WICHITA FALLS	57,400	57,070	57,570	2,870	2,810	2,170	4.8	4.7	3.6

†Sum of estimated number of total employed and unemployed workers residing in the specified areas

‡Includes resident wage and salary workers, self-employed, unpaid family workers and domestics in private households, agricultural workers and workers involved in labor-management disputes

*Preliminary—subject to revision. **Revised

TEXAS LABOR MARKET REVIEW
Official Publication of
TEXAS EMPLOYMENT COMMISSION
NOLAN F. WARD, Chairman
KEN CLAPP, Commissioner
A.C. SHIRLEY, Commissioner
ERNIE W. TULLIS, Administrator

Published Monthly at the TEC Building, Austin, Texas
Economic Research and Analysis Department

pute as many chemical plants suffered disruptions in operations while the dispute was in progress. The chemical and allied products industry surpassed its pre-dispute employment level for the first time during the past month and appears to be over the effect of the dispute as it posted a healthy gain.

A seasonal increase was registered in the food and kindred products portion of nondurable goods. The rise was reported in the canned fruits, vegetables, preserves, jams, and jellies section and in the frozen fruits, fruit juices and vegetables section. Most of the employment advances in this industry were realized in the Rio Grande Valley and followed the harvests of fruits and vegetables in the area. Other nondurable goods fell over the month as layoffs were noted in the rubber and tire segment of the industry. With new car sales down, many tire companies were feeling the effect and were forced to make cutbacks in their work forces. A very slight loss was posted in the paperboard containers and boxes segment of paper and allied products. The decline occurred over the month due to decreased hiring as many firms in the segment experienced less business activity.

Employment in the durable goods sector of manufacturing recorded a downturn as only a few of the industries were able to post any kind of gain. The settlement of a labor-management dispute and a slight upswing in business activity contributed to a modest advance in electric and electronic equipment, which also was the largest increase in the sector. Nonelectrical machinery decreased over the month in spite of a nice gain in the oil field machinery portion of the industry. The primary cause for the drop in nonelectrical machinery was a labor-management dispute.

The aircraft and parts segment of transportation equipment made a slight advance over the month, but losses in other segments of the industry produced a net decline in transportation equipment's employment. Stone, clay and glass products showed no change from a month ago, but the concrete, gypsum and plaster products segment registered a nominal rise as increased orders were reported. Primary metal industries was hurt by a lack of orders which led to a decrease in employment.

Nonmanufacturing employment was up over the month with gains reported in all industry categories except government. Construction, which had declined from April to May, made a strong comeback and posted a substantial increase from May to June. Much of the increase was attributed to favorable weather conditions and the hiring of summer workers; however, the engineering, architectural and surveying portion of other services was up significantly also as business activity increased. The tight credit policies which had previously restricted construction activity have eased somewhat and the result is an upturn in employment activity within the industry.

Services advanced considerably over the month. Besides the previously mentioned gain in other services, a large upswing was noted in health services, business and repair services, and amusements. The hiring of temporary workers for the summer season was a contributing factor in all of the advances posted by these portions of services. A large reduction occurred in educational services as colleges, universities and professional schools experienced the greatest decreases. The losses in educational services are seasonal and occur at the end of the spring semester each year.

Consumer demand for petroleum products has not lessened and this fact coupled with summer hiring, led to a sizeable gain in mining. Transportation, communication and public utilities realized a moderate rise with practically all of the increase centered in the public utilities sector. Transportation was down slightly and communication was up nominally, with neither segment demonstrating any significant movement. The increase in public utilities was attributed to seasonal hiring in electric services and gas production and distribution.

Trade moved up moderately with the increase split almost evenly between wholesale and retail trade. Gains were scattered among the wholesale trade industries, but the most notable advances were in chemicals and allied products and petroleum and petroleum products. The rise in retail trade was limited to food stores and apparel and accessory stores as all other segments posted small declines. Business activity took an upturn in food stores as more people began cooking outdoors with the onset of summer weather. A moderate gain was seen in finance, insurance and real estate. Banking was responsible for most of the increase, but a jump occurred in insurance carriers, agents and brokers as well.

HOURS AND EARNINGS EASE UPWARD

An average production worker in manufacturing earned $7.10 per hour and worked a 41.0-hour week during the month. This made the average weekly wage $291.10 for a production worker in Texas. One month ago average hourly earnings (AHE) were $7.08 over a 40.8-hour week, making the weekly earnings $288.86. At this time last year, AHE were $6.40 and average weekly hours (AWH) were 41.5 for a weekly earnings total of $265.60.

Increases in overtime led to wage rate increases in many industries over the month. Principally affected by advances in overtime worked were electric and electronic equipment; stone, clay and glass products; and textile mill products. The largest advance in AHE occurred in electric and electronic equipment where increased production activity also led to a rise in AWH. The concrete blocks and bricks segment was responsible for the gain in AHE in stone, clay and glass products, while broad woven cotton fabrics was behind the rise in AWH and AHE in textile mill products.

Transportation equipment experienced a jump in AWH and AHE as the aircraft and parts segment of the industry was responsible for the increases. Overtime was up in the segment in response to gains in business activity. Wage rate advances caused AHE to climb in

HOURS AND EARNINGS IN TEXAS*

SOURCE: TEXAS EMPLOYMENT COMMISSION IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS, U.S. DEPARTMENT OF LABOR

	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	JUNE† 1980	MAY 1980	JUNE 1979	JUNE† 1980	MAY 1980	JUNE 1979	JUNE† 1980	MAY 1980	JUNE 1979
FOR TEXAS									
MANUFACTURING—TOTAL	$291.10	$288.86	$265.60	41.0	40.8	41.5	$7.10	$7.08	$6.40
DURABLE GOODS	292.52	287.70	266.70	41.2	41.1	42.0	7.10	7.00	6.35
LUMBER & WOOD PRODUCTS	204.50	208.51	193.04	37.8	38.4	40.3	5.41	5.43	4.79
FURNITURE & FIXTURES	181.81	173.91	181.44	38.6	37.4	40.5	4.71	4.65	4.48
STONE, CLAY & GLASS PRODS	292.56	272.48	263.51	43.6	41.6	43.7	6.71	6.55	6.03
PRIMARY METAL INDUSTRIES	360.45	363.13	331.61	41.1	41.5	41.4	8.77	8.75	8.01
FABRICATED METAL PRODUCTS	302.95	300.77	272.30	41.5	41.6	41.7	7.30	7.23	6.53
MACHINERY, EXCEPT ELEC	304.73	307.73	278.40	42.5	43.1	42.7	7.17	7.14	6.52
OIL FIELD MACHINERY	365.04	365.20	327.44	44.9	44.7	43.6	8.13	8.17	7.51
ELEC. & ELECTRONIC EQUIP	259.26	240.59	240.37	40.7	40.3	43.0	6.37	5.97	5.59
TRANSPORTATION EQUIPMENT	362.25	347.04	319.42	41.4	40.4	41.7	8.75	8.59	7.66
AIRCRAFT & PARTS	406.85	385.42	367.35	43.7	42.4	44.1	9.31	9.09	8.33
INSTR. & RELATED PRODUCTS	213.68	209.97	205.13	38.5	37.9	40.7	5.55	5.54	5.04
MISC. MFG. INDUSTRIES	205.35	195.70	180.73	38.6	38.0	38.7	5.32	5.15	4.67
NONDURABLE GOODS	288.97	290.07	262.92	40.7	40.4	40.7	7.10	7.18	6.46
FOOD & KINDRED PRODUCTS	264.12	260.00	240.69	42.6	41.6	42.6	6.20	6.25	5.65
MEAT PRODUCTS	275.94	264.39	245.38	43.8	42.1	42.6	6.30	6.28	5.76
MALT BEVERAGES	529.47	511.87	482.94	53.0	51.6	44.8	9.99	9.92	10.78
TEXTILE MILL PRODUCTS	222.89	208.12	184.46	44.4	42.3	40.9	5.02	4.92	4.51
APPRL. & OTHER TEXT. PROD.	152.63	151.53	138.74	37.5	37.6	36.9	4.07	4.03	3.76
PAPER & ALLIED PRODUCTS	310.90	309.64	283.03	41.9	42.3	41.5	7.42	7.32	6.82
PRINTING & PUBLISHING	247.42	249.95	230.10	38.3	39.3	39.0	6.46	6.36	5.90
CHEMICALS & ALLIED PRODS	450.27	443.94	409.04	42.2	42.2	42.3	10.67	10.52	9.67
PETROLEUM & COAL PRODUCTS	431.99	482.47	415.15	41.9	42.1	43.2	10.31	11.46	9.61
PETROLEUM REFINING	446.61	504.78	433.44	41.7	42.1	43.0	10.71	11.99	10.08
LEATHER & LEATHER PRODUCTS	148.52	153.97	147.07	37.6	38.3	38.4	3.95	4.02	3.83
OTHER NONDURABLE GOODS	255.23	241.25	232.83	41.3	39.1	41.8	6.18	6.17	5.57
NONMANUFACTURING									
MINING	389.58	380.68	329.25	46.6	45.7	43.9	8.36	8.33	7.50
OIL & GAS EXTRACTION	392.84	383.88	331.13	46.6	45.7	43.8	8.43	8.40	7.56
METAL & COAL & NONMET. MINRLS., EXC. FUEL	314.64	304.38	295.14	46.0	44.5	45.9	6.84	6.84	6.43
COMMUNICATIONS, EXCEPT U.S. POSTAL SERV.	328.50	321.47	296.23	41.9	40.9	41.2	7.84	7.86	7.19
ELEC., GAS & SAN. SVCS.	332.98	328.72	301.29	43.3	41.4	41.5	7.69	7.94	7.26
WHOLESALE & RETAIL TRADE	195.65	189.94	181.76	35.0	34.1	35.5	5.59	5.57	5.12
WHOLESALE TRADE	286.40	282.27	266.09	40.0	39.7	40.5	7.16	7.11	6.57
RETAIL TRADE	157.59	150.89	146.96	32.9	31.7	33.4	4.79	4.76	4.40
GENERAL MDSE. STORES	115.67	108.77	125.36	25.2	23.8	30.5	4.59	4.57	4.11
BANKING	181.76	178.22	166.00	37.4	37.6	37.9	4.86	4.74	4.38
FOR THE MAJOR MARKETS									
AMARILLO									
MANUFACTURING	285.19	280.70	258.49	40.8	40.8	40.9	6.99	6.88	6.32
DURABLE GOODS	285.19	285.32	269.94	39.5	40.3	40.9	7.22	7.08	6.60
NONDURABLE GOODS	285.27	276.30	246.63	42.2	41.3	40.9	6.76	6.69	6.03
AUSTIN									
MANUFACTURING	235.06	227.28	205.32	41.9	41.1	40.9	5.61	5.53	5.02
DURABLE GOODS	240.41	232.13	209.48	42.4	41.6	41.4	5.67	5.58	5.06
NONDURABLE GOODS	211.46	203.95	188.28	39.6	38.7	38.9	5.34	5.27	4.84
BEAUMONT									
MANUFACTURING	401.88	443.73	384.72	40.8	42.3	42.0	9.85	10.49	9.16
DURABLE GOODS	350.06	336.87	311.40	40.8	39.4	40.6	8.58	8.55	7.67
NONDURABLE GOODS	431.66	511.56	425.86	40.8	44.1	42.8	10.58	11.60	9.95
CORPUS CHRISTI									
MANUFACTURING	314.61	305.52	283.54	40.7	40.2	39.6	7.73	7.60	7.16
DURABLE GOODS	266.17	260.30	214.78	38.8	38.0	35.5	6.86	6.85	6.05
NONDURABLE GOODS	347.76	335.69	327.89	42.0	41.7	42.2	8.28	8.05	7.77
DALLAS/FT. WORTH									
MANUFACTURING	273.77	264.37	247.80	40.8	40.3	41.3	6.71	6.56	6.00
DURABLE GOODS	291.40	280.02	262.91	41.1	40.7	42.2	7.09	6.88	6.23
NONDURABLE GOODS	237.98	233.83	217.01	40.2	39.7	39.6	5.92	5.89	5.48
EL PASO									
MANUFACTURING	208.01	212.93	188.60	39.1	40.1	40.3	5.32	5.31	4.68
DURABLE GOODS	235.59	244.90	233.23	33.8	34.3	41.5	6.97	7.14	5.62
NONDURABLE GOODS	199.10	202.44	173.13	40.8	42.0	39.8	4.88	4.82	4.35
GALVESTON									
MANUFACTURING	458.17	378.56	402.36	42.9	36.4	42.0	10.68	10.40	9.58
DURABLE GOODS	417.18	401.80	350.68	45.1	44.3	42.2	9.25	9.07	8.31
NONDURABLE GOODS	474.05	366.75	423.19	42.1	32.6	41.9	11.26	11.25	10.10
HOUSTON									
MANUFACTURING	358.69	357.79	331.25	42.6	42.9	43.3	8.42	8.34	7.65
DURABLE GOODS	346.90	342.94	313.20	43.2	43.3	43.2	8.03	7.92	7.25
NONDURABLE GOODS	378.14	382.39	359.39	41.6	42.3	43.3	9.09	9.04	8.30
LUBBOCK									
MANUFACTURING	220.18	218.56	208.38	40.4	40.4	42.7	5.45	5.41	4.88
DURABLE GOODS	213.15	211.43	203.01	39.4	39.3	41.6	5.41	5.38	4.88
NONDURABLE GOODS	236.56	235.64	222.01	42.7	43.0	45.4	5.54	5.48	4.89
SAN ANTONIO									
MANUFACTURING	217.88	208.90	188.00	41.9	40.8	40.0	5.20	5.12	4.70
DURABLE GOODS	234.90	220.32	194.68	43.1	40.8	40.9	5.45	5.40	4.76
NONDURABLE GOODS	201.06	197.40	181.89	40.7	40.7	39.2	4.94	4.85	4.64
WACO									
MANUFACTURING	239.32	236.84	227.88	38.6	38.7	39.7	6.20	6.12	5.74
DURABLE GOODS	246.48	247.83	237.48	39.0	39.4	41.3	6.32	6.29	5.75
NONDURABLE GOODS	231.49	223.78	217.36	38.2	37.8	38.0	6.06	5.92	5.72
WICHITA FALLS									
MANUFACTURING	247.29	250.49	234.00	38.7	39.2	40.0	6.39	6.39	5.85
DURABLE GOODS	256.90	262.25	248.84	38.4	39.2	40.2	6.69	6.69	6.19
NONDURABLE GOODS	217.09	215.52	190.21	39.4	39.4	39.3	5.51	5.47	4.84

*Figures cover Production Workers in Manufacturing and Mining industries only and Nonsupervisory Employees in other industry divisions. Earnings' averages include premium pay for overtime, holidays, and for late-shift work. †Preliminary—subject to revisions upon receipt of additional reports.

NONAGRICULTURAL WAGE AND SALARY† ESTIMATES—TEXAS

INDUSTRY	JUNE* 1980	MAY** 1980	JUNE** 1979	CHANGE FROM MAY 1980	CHANGE FROM JUNE 1979
TOTAL NONAGRICULTURAL EMPLOYMENT	5,779,600	5,761,400	5,621,300	18,200	158,300
MANUFACTURING	1,046,000	1,043,000	1,032,400	3,000	13,600
DURABLE GOODS	609,900	611,600	608,500	— 1,700	1,400
LUMBER & WOOD PRODUCTS	34,800	34,800	38,000	0	— 3,200
LOGGING CAMPS, SAWMILLS, PLANING MILLS	7,200	7,300	8,700	— 100	— 1,500
FURNITURE & FIXTURES	17,600	17,700	19,000	— 100	— 1,400
STONE, CLAY & GLASS PRODUCTS	44,000	44,000	46,200	0	— 2,200
CONCRETE, GYPSUM & PLASTER PRODUCTS	19,300	19,000	18,900	300	400
PRIMARY METAL INDUSTRIES	46,300	46,700	47,200	— 400	— 900
FABRICATED METAL PRODUCTS	93,600	93,800	93,400	— 200	200
FABRICATED STRUCTURAL METAL PRODUCTS	49,000	48,900	49,200	100	— 200
MACHINERY, EXCEPT ELECTRICAL	156,300	157,200	151,600	— 900	4,700
OIL FIELD MACHINERY	63,900	63,100	59,500	800	4,400
ELECTRIC & ELECTRONIC EQUIPMENT	103,400	102,600	100,900	800	2,500
TRANSPORTATION EQUIPMENT	82,300	82,700	81,700	— 400	600
AIRCRAFT & PARTS	49,600	49,300	46,300	300	3,300
INSTRUMENTS & RELATED PRODUCTS	18,900	19,100	18,400	— 200	500
MISCELLANEOUS MANUFACTURING INDUSTRIES	12,700	13,000	12,100	— 300	600
NONDURABLE GOODS	436,100	431,400	423,900	4,700	12,200
FOOD & KINDRED PRODUCTS	97,600	96,000	97,700	1,600	— 100
MEAT PRODUCTS	25,800	25,600	25,700	200	100
DAIRY PRODUCTS	5,500	5,400	5,500	100	0
BAKERY PRODUCTS	11,700	11,600	10,800	100	900
MALT BEVERAGES	3,600	3,700	3,600	— 100	0
TEXTILE MILL PRODUCTS	6,100	6,000	6,000	100	100
APPAREL & OTHER FINISHED TEXTILE PRODUCTS	77,000	76,900	75,700	100	1,300
PAPER & ALLIED PRODUCTS	22,100	22,300	22,400	— 200	— 300
PRINTING & PUBLISHING	62,200	62,100	59,100	100	3,100
NEWSPAPER, PERIODICALS, BOOKS & MISC. PUBL.	33,200	33,200	31,100	0	2,100
CHEMICALS & ALLIED PRODUCTS	82,800	81,700	81,100	1,100	1,700
PETROLEUM & COAL PRODUCTS	51,100	48,200	43,200	2,900	7,900
PETROLEUM REFINING	47,200	44,300	39,100	2,900	8,100
LEATHER & LEATHER PRODUCTS	7,700	7,700	7,600	0	100
OTHER NONDURABLE GOODS	29,500	30,500	31,100	— 1,000	— 1,600
TOTAL NONMANUFACTURING	4,733,600	4,718,400	4,588,900	15,200	144,700
MINING	220,900	218,100	199,700	2,800	21,200
OIL & GAS EXTRACTION	210,700	208,200	190,300	2,500	20,400
METAL & COAL & NONMET. MNRLS., EXC. FUEL	10,200	9,900	9,400	300	800
CONSTRUCTION	440,600	432,100	432,200	8,500	8,400
TRANSPORTATION & PUBLIC UTILITIES	363,300	362,200	355,100	1,100	8,200
RAILROAD TRANSPORTATION	31,900	31,900	31,500	0	400
TRANSPORTATION, EXCEPT RAILROADS	179,500	179,900	176,100	— 400	3,400
TRANSPORTATION BY AIR	36,100	36,000	34,200	100	1,900
COMMUNICATIONS, EXC. U.S. POSTAL SERVICE	80,100	80,000	80,700	100	— 600
ELECTRIC, GAS & SANITARY SERVICES	71,800	70,400	66,800	1,400	5,000
ELECTRIC SERVICES	38,700	37,900	35,000	800	3,700
GAS PRODUCTION & DISTRIBUTION	28,200	27,600	27,400	600	800
WHOLESALE & RETAIL TRADE	1,391,600	1,386,700	1,381,500	4,900	10,100
WHOLESALE TRADE	408,800	406,500	401,600	2,300	7,200
RETAIL TRADE	982,800	980,200	979,900	2,600	2,900
BUILDING MATERIALS & GARDEN SUPPLIES	45,400	45,800	46,000	— 400	— 600
GENERAL MERCHANDISE STORES	138,600	139,100	141,800	— 500	— 3,200
FOOD STORES	167,200	163,000	159,200	4,200	8,000
AUTOMOTIVE DEALERS & SERVICE STATIONS	122,300	123,000	128,500	— 700	— 6,200
APPAREL & ACCESSORY STORES	76,300	76,100	72,600	200	3,700
OTHER RETAIL TRADE	433,000	433,200	431,800	— 200	1,200
FINANCE, INSURANCE & REAL ESTATE	330,900	328,100	317,600	2,800	13,300
BANKING	87,800	86,400	82,600	1,400	5,200
INSURANCE CARRIERS, AGENTS & BROKERS	114,800	114,000	110,700	800	4,100
OTHER FINANCE, INSURANCE & REAL ESTATE	128,300	127,700	124,300	600	4,000
SERVICES	1,004,000	995,200	968,600	8,800	35,400
HOTELS & OTHER LODGING PLACES	57,800	57,800	57,700	0	100
PERSONAL SERVICES	62,300	61,500	62,600	800	— 300
BUSINESS & REPAIR SERVICES	255,900	253,800	247,100	2,100	8,800
AMUSEMENT, INCLUDING MOTION PICTURES	48,900	47,200	47,000	1,700	1,900
HEALTH SERVICES	270,200	266,800	259,800	3,400	10,400
EDUCATIONAL SERVICES	44,700	51,800	44,800	— 7,100	— 100
OTHER SERVICES & MISCELLANEOUS	264,200	256,300	249,600	7,900	14,600
TOTAL GOVERNMENT	982,300	996,000	934,200	—13,700	48,100
TOTAL FEDERAL GOVERNMENT	166,400	164,300	165,500	2,100	900
TOTAL STATE GOVERNMENT	191,100	197,900	189,500	— 6,800	1,600
TOTAL LOCAL GOVERNMENT	624,800	633,800	579,200	— 9,000	45,600
TOTAL MANUFACTURING PRODUCTION WORKERS	721,400	720,100	718,400	1,200	2,900
DURABLE GOODS	412,500	414,600	416,200	— 2,100	— 3,700
NONDURABLE GOODS	308,800	305,500	302,200	3,300	6,600

†Estimated number of nonagricultural jobs in Texas without reference to place of residence of workers. ‡Estimates of TEC in cooperation with Bureau of Labor Statistics and Employment and Training Administration, U.S. Department of Labor. *Preliminary, subject to revision. **Revised.

several industries, especially banking, paper and allied products, and chemicals and allied products.

AWH were down and AHE were up in printing and publishing as firms involved in publishing school yearbooks curtailed their activities. Many lower-paid production workers were released leading to the rise in hourly earnings. On the other hand, electric, gas and sanitary services added many summer workers at entry level wages leading to a gain in hours and a drop in AHE.

Hours and earnings decreased in petroleum and coal products. The occurrence and subsequent settlement of a labor-management dispute of large proportions in the petroleum refining segment has had a severe impact on AHE and AWH in this industry.

AGRICULTURAL EMPLOYMENT ADVANCES

Statewide employment in agriculture rose from 199,500 at mid-May to 211,900 at mid-June. The number of seasonal farmworkers employed at mid-month was 83,900, compared to 86,200 at mid-June a year ago. Warm summer temperatures combined with the harvests of spring crops and the planting of summer crops to boost the total employment figure by over six percent from May to June.

Cotton activities employed 20,250 seasonal workers for an increase of just over two percent from the same period last year. Cotton planting was ahead of schedule and essentially completed by mid-month. Seasonal employment in vegetable activities fell from 16,150 in June 1979 to 15,450 for June 1980. Vegetable harvests continued in the Lower Rio Grande Valley and the Rio Grande Plains.

Feed and grain activities provided work for 30,200 seasonal farmworkers, down slightly from the 30,850 employed last year. Grain sorghum and soybean planting were nearing completion, although some replanting of soybeans was required in Northwest Texas after heavy rains passed through the area. The peach harvest was underway in many areas.

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TEXAS LABOR MARKET REVIEW

T E C. BUILDING AUGUST 1980 AUSTIN, TEXAS 78778

ADVANCE RECORDED IN STATEWIDE EMPLOYMENT

Total employment climbed by just over 100,000 from mid-June to mid-July in Texas as a large number of summer jobseekers were able to find some type of seasonal work. The State's civilian labor force also rose over the same period, as a result of the seasonal influx of jobhunters. The percentage of the civilian labor force that was out of work declined from 6.0 percent at mid-June to 5.6 percent at mid-July. The unemployment rate for Texas in July 1979 was 4.7 percent.

The total number of unemployed in the State reached 385,500 at mid-June and fell over the month to a level of 361,300 at mid-July. The July figure is some 20.1 percent above the year-ago level in Statewide unemployment. The National unemployment rate for June was 7.8 percent and it rose slightly to 7.9 percent at mid-July. The seasonally adjusted unemployment rate for July 1980 was 5.2 percent for Texas and 7.8 percent for the Nation.

SMALL HIKE SEEN IN WAGE AND SALARY

An extremely slight increase was recorded in total nonagricultural wage and salary employment from mid-June to mid-July. Statewide the increase amounted to only 1,400 and was located entirely in the nonmanufacturing sector. Manufacturing sustained heavy employment losses in three separate industries which led to a setback for the whole sector.

Within the durable goods category of manufacturing, a rather substantial loss was seen in primary metal industries. Three labor-management disputes and a layoff contributed to the decline within the industry. Nonelectrical machinery also posted a sizeable drop in employment as a layoff occurred at a large firm in refrigeration and heating equipment. A small gain was observed in special industry machinery, although the upturn was not nearly large enough to offset the declines in the other segments of nonelectrical machinery.

All of the changes within the durable goods sector were not bad, however, as several industries did manage to achieve increases in employment. A rise in the number of orders led to an upturn in furniture and fixtures with most of the gain occurring among household furniture firms. Lumber and wood products also advanced as business activity picked up and a number of seasonal workers were available for immediate employment. Transportation equipment experienced a small hike over the month with most of the upswing coming from the aircraft and parts portion of the industry. Slight increases in other segments of the industry helped to offset a loss in the truck trailers portion of transportation equipment.

A very modest gain was recorded among the nondurable goods industries in spite of a substantial loss in apparel and other finished textile products. All segments of this

SUMMARY OF LABOR FORCE† ESTIMATES

	TOTAL EMPLOYMENT‡			TOTAL UNEMPLOYMENT			UNEMPLOYED AS % OF LABOR FORCE		
	JULY* 1980	JUNE** 1980	JULY** 1979	JULY* 1980	JUNE** 1980	JULY** 1979	JULY* 1980	JUNE** 1980	JULY** 1979
STATEWIDE	6,145,000	6,043,900	6,058,200	361,300	385,500	300,800	5.6	6.0	4.7
ABILENE	65,590	64,450	64,750	2,760	2,910	2,250	4.0	4.3	3.4
AMARILLO	85,850	84,570	86,160	3,890	4,240	3,510	4.3	4.8	3.9
AUSTIN	245,400	240,800	241,400	10,100	10,200	8,950	4.0	4.1	3.6
BEAUMONT-PORT ARTHUR-ORANGE	151,400	147,700	153,700	11,750	13,100	11,100	7.2	8.1	6.7
BROWNSVILLE-HARLINGEN-SAN BENITO	65,170	65,340	64,810	7,640	8,820	7,360	10.5	11.9	10.2
BRYAN-COLLEGE STATION	38,800	37,180	37,930	1,710	1,770	1,230	4.2	4.5	3.1
CORPUS CHRISTI	135,700	132,750	136,800	9,500	9,850	7,800	6.5	6.9	5.4
DALLAS-FORT WORTH	1,486,600	1,460,400	1,441,700	74,600	81,200	59,500	4.8	5.3	4.0
EL PASO	159,700	156,550	156,950	16,300	17,550	14,900	9.3	10.1	8.7
GALVESTON-TEXAS CITY	81,310	79,270	77,770	6,060	6,070	4,820	6.9	7.1	5.8
HOUSTON	1,419,700	1,395,600	1,394,800	67,900	70,800	55,500	4.6	4.8	3.8
KILLEEN-TEMPLE	61,340	60,250	51,680	4,020	4,130	3,460	6.2	6.4	5.3
LAREDO	32,310	31,580	29,680	3,810	4,140	3,630	10.5	11.6	10.9
LONGVIEW-MARSHALL	63,440	62,070	64,220	5,070	5,070	3,760	7.4	7.6	5.5
LUBBOCK	98,190	95,650	97,560	4,740	5,090	4,050	4.6	5.1	4.0
MCALLEN-PHARR-EDINBURG	73,830	78,180	73,110	12,030	11,880	10,420	14.0	13.2	12.5
MIDLAND	48,330	47,130	44,870	1,820	2,450	1,810	3.6	4.9	3.9
ODESSA	61,000	59,680	58,920	2,900	2,950	2,560	4.5	4.7	4.2
SAN ANGELO	42,620	41,600	41,540	1,880	1,790	1,480	4.2	4.1	3.4
SAN ANTONIO	396,550	391,800	390,350	29,800	35,100	27,450	7.0	8.2	6.6
SHERMAN-DENISON	38,510	37,720	39,410	2,710	2,790	2,020	6.6	6.9	4.9
TEXARKANA	44,730	44,030	46,980	5,050	5,330	3,910	10.1	10.8	7.7
TYLER	59,550	58,810	62,010	4,610	4,780	2,980	7.2	7.5	4.6
WACO	76,130	74,750	75,990	4,920	5,010	3,520	6.1	6.3	4.4
WICHITA FALLS	58,260	57,540	57,900	2,850	2,920	2,260	4.7	4.8	3.8

†Sum of estimated number of total employed and unemployed workers residing in the specified areas

‡Includes resident wage and salary workers, self-employed, unpaid family workers and domestics in private households, agricultural workers and workers involved in labor management disputes

*Preliminary – subject to revision. **Revised

TEXAS LABOR MARKET REVIEW
Official Publication of
TEXAS EMPLOYMENT COMMISSION
NOLAN F. WARD — Chairman
KEN CLAPP — Commissioner
A.C. SHIRLEY — Commissioner
ERNIE W. TULLIS, Administrator

Published Monthly at the TEC Building, Austin, Texas
Economic Research and Analysis Department

particular industry showed reductions. Over half of the decline occurred in women's and misses' outerwear and women's and children's undergarments. The only other decline in nondurable goods was a slight drop in paper and allied products as the rest of the industries either posted a small gain or were unchanged.

Total nonmanufacturing employment took a slight upswing over the month as most of the industrial categories posted advances. Mining and finance, insurance and real estate experienced increases of similar quantities. Mining growth was stimulated by consumer demand, favorable weather and an abundance of seasonal workers. The real estate division of finance, insurance and real estate was largely responsible for the rise in that category. Summer is generally the busiest season for home sales as families with children prefer to move between the school terms and this season was no exception. New plans for financing homes and a big demand for residential property has helped home sales to remain surprisingly high in spite of rising interest rates on home mortgages.

Trade and services also posted gains of similar amounts, although these increases were much less than those noted in mining and finance, insurance and real estate. The food stores segment of retail trade reported the largest single gain during the month. An upturn in business activity plus the hiring of a large number of summer workers was a boon to employment in food stores. Other segments of retail trade were not as fortunate, however, as losses in furniture, home furnishings and equipment stores, and miscellaenous retail were considerable and, when coupled with declines in the remaining sectors of retail trade, offset most of the gain in food stores.

Services was paced by advances in amusement, including motion pictures, and other services and miscellaneous. The increase in amusement was due to a large number of summer hires. Summer is the peak season for amusement with many facilities open only for the summer months. Elsewhere in services, losses were noted in personal services, hotels and other lodging places, and educational services. The only surprise here was the drop in hotels and other lodging places which usually benefit from the summer tourist season. It is likely that high gasoline costs plus an extremely hot and dry summer have combined to discourage many people from taking vacations away from home this season.

Transportation and public utilities rose on the strength of a large gain in electric, gas, and sanitary services. Continued seasonal hiring in electric services and gas production and distribution were primarily responsible for the increase.

A moderate decline occurred in construction as general building construction suffered employment losses. Several firms reported job completions over the month which contributed to the decline. Government employment also dropped with all of the loss occurring in local government. Local educational institutions carried all of the decrease as additional faculty separations were reported and other nonfaculty posisions were terminated for the summer. Seasonal hiring contributed to gains in most federal and state government agencies, although the gains could not offset the large reduction in local educational institutions.

AVERAGE WEEKLY EARNINGS DROP SLIGHTLY

An average production worker in manufacturing earned $7.21 per hour and worked a 40.6 hour week over the month in Texas. The average weekly earnings were $292.73, somewhat below last month's figure of $293.04, but substantially higher than the year-ago level of $262.44. Average hourly earnings (AHE) increased from a month ago while average weekly hours (AWH) showed a slight decrease.

Business gains plus advances in the amount of overtime worked led to increases in both hours and earnings for workers in petroleum and coal products, other nondurable goods, meat products, lumber and wood products, and paper and allied products.

Overtime pay also contributed to gains in AHE in malt beverages, aircraft and parts, and miscellaneous manufacturing industries. Losses in AWH were also evident in aircraft and parts and miscellaneous manufacturing industries. The loss of lower-paid production workers led to a decrease in AWH in printing and publishing and an increase in AHE in the industry.

Reductions in overtime cut hours and earnings in nonelectrical machinery and electric and electronic equipment as both industries felt the effects of decreasing business activity. Primary metal products was hit by a combination of labor-management disputes and a layoff which led to reduced hours and earnings.

DROUGHT HITS FARM EMPLOYMENT

Agricultural employment in Texas declined from a level of 211,900 at mid-June to 205,200 at mid-July. Extremely hot and dry weather conditions had a negative effect on farm employment during the month. Seasonal employment dropped from 81,400 a year ago to 77,200 at mid-July.

All crop activities employed fewer workers this season than last year. Some cotton fields were reported to be wilting from the heat. South Texas cotton matured early due to the extreme weather conditions. Employment in cotton activities declined 8.0 percent from a year ago.

Vegetable activities and feed and grain activities employed, respectively, 5.7 percent and 7.0 percent fewer workers this year than last. Dryland crops have suffered large losses and pastures have been severely affected by the high temperatures and lack of rainfall. Livestock held up reasonably well across the State, although some areas reported severe shortages of foraging food and some livestock losses. Some crops were literally wilting in the fields as extreme temperatures were recorded across most of the State during the month.

HOURS AND EARNINGS IN TEXAS*

SOURCE: TEXAS EMPLOYMENT COMMISSION IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS, U.S. DEPARTMENT OF LABOR

	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	JULY† 1980	JUNE 1980	JULY 1979	JULY† 1980	JUNE 1980	JULY 1979	JULY† 1980	JUNE 1980	JULY 1979
FOR TEXAS									
MANUFACTURING—TOTAL	$292.73	$293.04	$262.44	40.6	41.1	40.5	$7.21	7.13	$6.48
DURABLE GOODS	288.77	293.34	259.61	40.5	41.2	40.5	7.13	7.12	6.41
LUMBER & WOOD PRODUCTS	219.70	208.35	204.42	39.8	38.3	40.4	5.52	5.44	5.06
FURNITURE & FIXTURES	178.10	179.92	181.52	38.3	38.2	40.7	4.65	4.71	4.46
STONE, CLAY & GLASS PRODS	291.50	287.67	263.44	43.2	43.0	43.4	6.75	6.69	6.07
PRIMARY METAL INDUSTRIES	351.04	365.51	337.43	39.8	41.3	41.1	8.82	8.85	8.21
FABRICATED METAL PRODUCTS	298.39	306.07	269.34	41.1	42.1	41.5	7.26	7.27	6.49
MACHINERY, EXCEPT ELEC	298.60	299.46	269.37	41.3	42.0	41.0	7.23	7.13	6.57
OIL FIELD MACHINERY	348.04	349.74	320.03	42.6	43.5	42.5	8.17	8.04	7.53
ELEC. & ELECTRONIC EQUIP	243.27	263.49	200.12	37.5	40.6	35.8	6.47	6.49	5.59
TRANSPORTATION EQUIPMENT	357.47	361.79	309.14	40.9	41.3	40.2	8.74	8.76	7.69
AIRCRAFT & PARTS	392.48	407.72	347.75	42.8	43.7	42.1	9.17	9.33	8.26
INSTR. & RELATED PRODUCTS	225.55	223.40	213.27	39.5	39.4	40.7	5.71	5.67	5.24
MISC. MFG. INDUSTRIES	202.07	202.80	180.21	37.7	39.0	38.1	5.36	5.20	4.73
NONDURABLE GOODS	298.98	293.56	266.09	40.9	41.0	40.5	7.31	7.16	6.57
FOOD & KINDRED PRODUCTS	274.99	280.92	238.21	42.7	44.1	41.5	6.44	6.37	5.74
MEAT PRODUCTS	293.48	279.20	239.13	44.0	43.9	41.3	6.67	6.36	5.79
MALT BEVERAGES	542.91	535.93	472.38	53.7	53.7	43.1	10.11	9.98	10.96
TEXTILE MILL PRODUCTS	217.15	222.64	179.26	43.0	44.0	38.8	5.05	5.06	4.62
APPRL. & OTHER TEXT. PROD	148.56	153.00	137.56	36.5	37.5	36.2	4.07	4.08	3.80
PAPER & ALLIED PRODUCTS	325.93	306.08	296.24	43.4	41.7	42.2	7.51	7.34	7.02
PRINTING & PUBLISHING	253.27	247.68	231.27	38.2	38.4	39.0	6.63	6.45	5.93
CHEMICALS & ALLIED PRODS	452.38	451.54	413.40	42.2	42.2	42.4	10.72	10.70	9.75
PETROLEUM & COAL PRODUCTS	472.75	439.10	424.60	44.1	42	44.0	10.72	10.43	9.65
PETROLEUM REFINING	491.06	454.20	440.93	44.2	41.9	43.7	11.11	10.84	10.09
LEATHER & LEATHER PRODUCTS	146.15	156.36	129.47	37.0	38.8	36.8	3.95	4.03	3.79
OTHER NONDURABLE GOODS	269.66	254.20	241.12	42.4	41.2	42.6	6.36	6.17	5.66
NONMANUFACTURING	393.69	391.00	325.04	46.1	46.0	42.6	8.54	8.50	7.63
MINING	396.92	394.22	326.83	46.1	46.0	42.5	8.61	8.57	7.69
OIL & GAS EXTRACTION	325.03	322.48	298.27	46.7	46.2	46.1	6.96	6.98	6.47
METAL & COAL & NONMET. MRNLS., EXC. FUEL	341.54	325.20	295.92	43.9	41.8	41.1	7.78	7.78	7.20
COMMUNICATIONS, EXCEPT U.S. POSTAL SERV.	336.13	336.88	304.22	41.6	41.9	41.0	8.08	8.04	7.42
ELEC., GAS & SAN. SVCS.	197.82	194.53	182.83	35.2	34.8	35.5	5.62	5.59	5.15
WHOLESALE & RETAIL TRADE	289.88	286.80	264.37	40.6	40.0	40.3	7.14	7.17	6.56
WHOLESALE TRADE	159.24	156.15	149.08	32.9	32.6	33.5	4.84	4.79	4.45
RETAIL TRADE	119.09	115.04	129.63	25.5	24.9	30.5	4.67	4.62	4.25
GENERAL MDSE. STORES	179.68	180.53	167.77	37.2	37.3	37.7	4.83	4.84	4.45
BANKING									
FOR THE MAJOR MARKETS									
AMARILLO	288.42	291.99	248.71	41.8	41.3	38.5	6.90	7.07	6.46
MANUFACTURING	257.11	267.36	272.92	39.8	39.8	39.9	6.46	7.22	6.84
DURABLE GOODS	313.35	295.91	223.85	43.4	42.7	37.0	7.22	6.93	6.05
NONDURABLE GOODS									
AUSTIN	233.95	235.82	196.32	40.9	41.3	39.5	5.72	5.71	4.97
MANUFACTURING	240.95	242.02	197.50	41.4	41.8	39.5	5.82	5.79	5.00
DURABLE GOODS	202.79	207.19	190.79	38.7	38.8	39.5	5.24	5.34	4.83
NONDURABLE GOODS									
BEAUMONT	425.96	419.25	365.56	42.3	41.8	42.0	10.07	10.03	9.18
MANUFACTURING	349.60	354.77	310.31	40.0	41.3	40.3	8.74	8.59	7.70
DURABLE GOODS	470.01	455.28	427.28	43.6	42.0	42.9	10.78	10.84	9.96
NONDURABLE GOODS									
CORPUS CHRISTI	308.70	310.31	279.20	40.3	40.3	40.7	7.66	7.70	6.86
MANUFACTURING	271.05	263.25	234.08	39.0	38.6	38.0	6.95	6.82	6.16
DURABLE GOODS	334.13	341.96	321.90	41.2	41.4	42.3	8.11	8.26	7.61
NONDURABLE GOODS									
DALLAS/FT. WORTH	270.24	274.32	237.40	39.8	40.7	39.5	6.79	6.74	6.01
MANUFACTURING	283.77	291.92	246.93	39.8	41.0	39.7	7.13	7.12	6.22
DURABLE GOODS	241.77	238.19	219.13	39.7	40.1	39.2	6.09	5.94	5.59
NONDURABLE GOODS									
EL PASO	196.84	209.75	185.11	38.0	39.8	37.7	5.18	5.27	4.91
MANUFACTURING	235.30	239.40	245.22	34.4	34.2	40.6	6.84	7.00	6.04
DURABLE GOODS	183.85	200.51	164.42	39.2	41.6	36.7	4.69	4.82	4.48
NONDURABLE GOODS									
GALVESTON	457.06	460.51	411.74	43.2	43.2	42.1	10.58	10.66	9.78
MANUFACTURING	425.92	432.43	345.86	45.7	46.8	39.8	9.32	9.24	8.69
DURABLE GOODS	468.00	471.09	438.17	42.2	41.8	43.0	11.09	11.27	10.19
NONDURABLE GOODS									
HOUSTON	363.78	360.77	327.68	43.0	43.0	42.5	8.46	8.39	7.71
MANUFACTURING	340.05	341.97	308.37	42.4	42.8	42.3	8.02	7.99	7.29
DURABLE GOODS	402.12	391.90	359.09	43.9	43.4	42.8	9.16	9.03	8.39
NONDURABLE GOODS									
LUBBOCK	232.40	231.24	196.21	41.5	41.0	39.4	5.60	5.64	4.98
MANUFACTURING	228.73	224.87	189.70	40.7	40.3	38.4	5.62	5.58	4.94
DURABLE GOODS	241.43	245.80	211.42	43.5	42.6	41.7	5.55	5.77	5.07
NONDURABLE GOODS									
SAN ANTONIO	217.15	216.42	188.80	41.5	41.7	40.0	5.22	5.19	4.72
MANUFACTURING	230.15	231.32	194.62	42.7	42.6	40.8	5.39	5.43	4.77
DURABLE GOODS	204.12	201.55	183.92	40.5	40.8	39.3	5.04	4.94	4.68
NONDURABLE GOODS									
WACO	250.34	237.70	224.16	39.3	38.4	40.1	6.37	6.19	5.59
MANUFACTURING	252.86	245.07	232.63	40.2	38.9	41.1	6.29	6.30	5.66
DURABLE GOODS	247.80	229.67	214.89	38.3	37.9	39.0	6.47	6.06	5.51
NONDURABLE GOODS									
WICHITA FALLS	254.28	246.27	236.12	39.0	38.6	38.9	6.52	6.38	6.07
MANUFACTURING	266.17	255.84	255.06	38.8	38.3	39.3	6.86	6.68	6.49
DURABLE GOODS	216.94	218.20	180.58	39.3	39.6	37.7	5.52	5.51	4.79
NONDURABLE GOODS									

*Figures cover Production Workers in Manufacturing and Mining industries only and Nonsupervisory Employees in other industry divisions. Earnings' averages include premium pay for overtime, holidays, and for late-shift work. †Preliminary—subject to revisions upon receipt of additional reports.

NONAGRICULTURAL WAGE AND SALARY† ESTIMATES—TEXAS

INDUSTRY	JULY* 1980	JUNE** 1980	JULY** 1979	CHANGE FROM JUNE 1980	CHANGE FROM JULY 1979
‡TOTAL NONAGRICULTURAL EMPLOYMENT	5,777,000	5,775,600	5,628,100	1,400	149,000
MANUFACTURING	1,045,300	1,048,700	1,033,000	3,400	12,300
DURABLE GOODS	608,700	612,300	608,800	3,600	100
LUMBER & WOOD PRODUCTS	35,000	34,600	37,800	400	2,800
LOGGING CAMPS, SAWMILLS, PLANING MILLS	7,400	7,300	8,700	100	1,300
FURNITURE & FIXTURES	17,900	17,600	18,600	300	700
STONE, CLAY & GLASS PRODUCTS	44,000	44,000	46,100	-0-	2,100
CONCRETE, GYPSUM & PLASTER PRODUCTS	19,400	19,200	18,900	200	500
PRIMARY METAL INDUSTRIES	43,200	46,600	46,900	3,400	3,700
FABRICATED METAL PRODUCTS	93,900	94,000	93,600	100	300
FABRICATED STRUCTURAL METAL PRODUCTS	49,300	49,200	49,200	100	100
MACHINERY, EXCEPT ELECTRICAL	155,600	156,800	151,800	1,200	3,800
OIL FIELD MACHINERY	63,800	63,900	59,400	100	4,400
ELECTRIC & ELECTRONIC EQUIPMENT	104,800	104,600	102,100	200	2,700
TRANSPORTATION EQUIPMENT	82,800	82,500	81,400	300	1,400
AIRCRAFT & PARTS	50,200	49,600	46,600	600	3,600
INSTRUMENTS & RELATED PRODUCTS	18,800	18,800	18,500	-0-	300
MISCELLANEOUS MANUFACTURING INDUSTRIES	12,700	12,800	12,000	100	700
NONDURABLE GOODS	436,600	436,400	424,200	200	12,400
FOOD & KINDRED PRODUCTS	98,300	97,700	98,300	600	-0-
MEAT PRODUCTS	26,100	25,800	25,700	300	400
DAIRY PRODUCTS	5,500	5,500	5,500	-0-	-0-
BAKERY PRODUCTS	11,900	11,700	10,900	200	1,000
MALT BEVERAGES	3,800	3,600	3,700	200	100
TEXTILE MILL PRODUCTS	6,100	6,100	5,900	-0-	200
APPAREL & OTHER FINISHED TEXTILE PRODUCTS	75,700	76,800	75,200	1,100	500
PAPER & ALLIED PRODUCTS	21,900	22,100	22,400	200	500
PRINTING & PUBLISHING	62,400	62,200	59,600	200	2,800
NEWSPAPER, PERIODICALS, BOOKS & MISC. PUBL.	33,500	33,300	31,300	200	2,200
CHEMICALS & ALLIED PRODUCTS	83,100	82,900	81,200	200	1,900
PETROLEUM & COAL PRODUCTS	51,500	51,100	43,400	400	8,100
PETROLEUM REFINING	47,800	47,200	39,500	600	8,300
LEATHER & LEATHER PRODUCTS	7,800	7,700	7,300	100	500
OTHER NONDURABLE GOODS	29,800	29,800	30,900	-0-	1,100
TOTAL NONMANUFACTURING	4,731,700	4,726,900	4,595,000	4,800	136,700
MINING	227,100	223,400	201,400	3,700	25,700
OIL & GAS EXTRACTION	216,900	213,300	191,900	3,600	25,000
METAL & COAL & NONMET. MNRLS., EXC. FUEL	10,200	10,100	9,500	100	700
CONSTRUCTION	437,900	441,400	436,800	3,500	1,100
TRANSPORTATION & PUBLIC UTILITIES	364,600	363,200	356,000	1,400	8,600
RAILROAD TRANSPORTATION	31,500	31,500	31,500	-0-	-0-
TRANSPORTATION, EXCEPT RAILROADS	179,700	179,300	175,600	400	4,100
TRANSPORTATION BY AIR	35,800	35,900	34,300	100	1,500
COMMUNICATIONS, EXC. U.S. POSTAL SERVICE	80,700	80,500	81,400	200	700
ELECTRIC, GAS & SANITARY SERVICES	72,700	71,900	67,500	800	5,200
ELECTRIC SERVICES	39,100	38,700	35,500	400	3,600
GAS PRODUCTION & DISTRIBUTION	28,500	28,200	27,700	300	800
WHOLESALE & RETAIL TRADE	1,389,500	1,388,000	1,377,700	1,500	11,800
WHOLESALE TRADE	408,600	408,300	399,600	300	9,000
RETAIL TRADE	980,900	979,700	978,100	1,200	2,800
BUILDING MATERIALS & GARDEN SUPPLIES	44,900	45,300	46,000	400	1,100
GENERAL MERCHANDISE STORES	138,700	139,100	141,900	400	3,200
FOOD STORES	169,100	162,900	159,400	6,200	9,700
AUTOMOTIVE DEALERS & SERVICE STATIONS	121,700	122,100	127,600	400	5,900
APPAREL & ACCESSORY STORES	75,700	76,300	72,300	600	3,400
OTHER RETAIL TRADE	430,800	434,000	430,900	3,200	100
FINANCE, INSURANCE & REAL ESTATE	335,100	331,400	318,800	3,700	16,300
BANKING	88,300	87,800	83,000	500	5,300
INSURANCE CARRIERS, AGENTS & BROKERS	115,800	114,900	110,700	900	5,100
OTHER FINANCE, INSURANCE & REAL ESTATE	131,000	128,700	125,100	2,300	5,900
SERVICES	1,003,500	1,002,000	971,900	1,500	31,600
HOTELS & OTHER LODGING PLACES	57,400	58,000	57,800	600	400
PERSONAL SERVICES	61,400	62,200	63,100	800	1,700
BUSINESS & REPAIR SERVICES	257,800	257,400	246,900	400	10,900
AMUSEMENT, INCLUDING MOTION PICTURES	50,500	49,400	48,000	1,100	2,500
HEALTH SERVICES	270,300	269,900	260,600	400	9,700
EDUCATIONAL SERVICES	42,100	42,700	45,000	600	2,900
OTHER SERVICES & MISCELLANEOUS	264,000	262,400	250,500	1,600	13,500
TOTAL GOVERNMENT	974,000	977,500	932,400	3,500	41,600
TOTAL FEDERAL GOVERNMENT	167,800	167,000	165,800	800	2,000
TOTAL STATE GOVERNMENT	192,100	189,100	191,600	3,000	500
TOTAL LOCAL GOVERNMENT	614,100	621,400	575,000	7,300	39,100
TOTAL MANUFACTURING PRODUCTION WORKERS	716,000	722,100	718,000	6,100	2,000
DURABLE GOODS	407,400	413,000	415,800	5,600	8,400
NONDURABLE GOODS	308,600	309,100	302,200	500	6,400

†Estimated number of nonagricultural jobs in Texas without reference to place of residence of workers. ‡Estimates of TEC in cooperation with Bureau of Labor Statistics and Employment and Training Administration, U.S. Department of Labor. *Preliminary, subject to revision. **Revised.

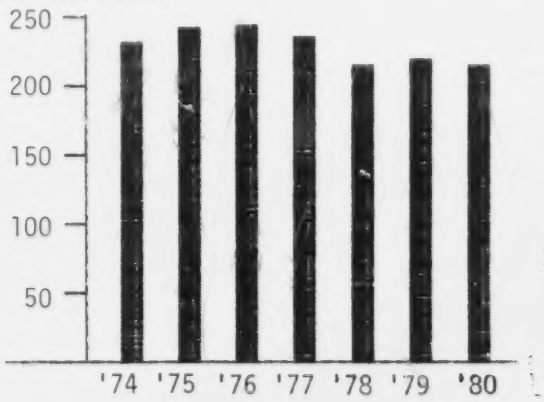
YOUTH PUBLICATION AVAILABLE

A supplemental report on youth employment has been prepared by the Labor Market Information Section of the Economic Research and Analysis Department. The report contains updated tables on youth employment and unemployment in the United States and Texas. Copies of the publication may be obtained by writing to:

Economic Reseach and Analysis Dept.
LMI Section
TEC Building
15th and Congress Avenue
Austin, Texas 78778

A table detailing the characteristics of the insured unemployed for a three month period ending August 31, 1980, is also available and may be obtained by writing to the above address.

STATEWIDE EMPLOYMENT IN AGRICULTURE
Month of July 1974-1980
In Thousands



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TEXAS LABOR MARKET REVIEW

T.E.C. BUILDING | SEPTEMBER 1980 | AUSTIN, TEXAS 78778

EFFECTS OF SEASONAL EMPLOYMENT FELT

Total employment in Texas increased for the third consecutive month as it reached a record level at mid-August. Employment in the State was boosted during the summer months by a large supply of seasonal workers. However, as employment levels climbed, unemployment figures went up also as a big portion of the seasonal labor force was not able to find work. Unemployment figures during the past summer were the highest since the summer of 1976. The total unemployment estimate of 377,000 for August is the highest for the month since August 1977 when 355,000 people were out of work.

The unemployment rate for the State in August was 5.8 percent, somewhat above the July rate of 5.6 percent and well above the year-ago rate of 4.6 percent. An unemployment rate of 7.5 percent was recorded in August for the United States. The July rate for the Nation was 7.8 percent and the year-ago rate was 5.9 percent. The seasonally adjusted rate for Texas was 5.5 percent in August and for the Nation it was 7.6 percent.

WAGE AND SALARY EMPLOYMENT DECREASES

After reaching an all time high during July, total nonagricultural employment in Texas declined over the month due to cutbacks in government employment.

A drop of 14,100 was recorded in total nonagricultural employment from mid-July to mid-August. Government employment, however, was down 15,900 over the same period. The only government sector which did not decline over the month was the post office. Educational institutions were caught between the end of the summer term and the beginning of the fall term in reporting employment losses. Administrative agencies in all government levels, federal, state, and local, saw many seasonal employees leave to prepare to return to school in the fall. Budget authority also ended for many other temporary or seasonal workers.

While the drop in government employment led to a large reduction in total nonagricultural employment and in nonmanufacturing employment, the manufacturing sector was experiencing a decline of its own. Fortunately the sector realized only a modest setback which was largely the result of a series of moderate losses in the nondurable goods category. Almost all of the segments in the nondurable goods field recorded either a small loss or no change at all. General declines in business activity were felt in the bakery products segment of food and kindred products, apparel and other textile products, and chemicals and allied products.

SUMMARY OF LABOR FORCE† ESTIMATES

	TOTAL EMPLOYMENT‡			TOTAL UNEMPLOYMENT			UNEMPLOYED AS % OF LABOR FORCE		
	AUG.* 1980	JULY** 1980	AUG** 1979	AUG.* 1980	JULY** 1980	AUG** 1979	AUG.* 1980	JULY** 1980	AUG** 1979
STATEWIDE	6,165,700	6,145,000	5,962,900	377,000	361,300	288,500	5.8	5.6	4.6
ABILENE	65,610	65,620	63,130	2,810	2,760	1,980	4.1	4.0	3.0
AMARILLO	86,130	85,820	84,890	3,810	3,900	3,270	4.2	4.3	3.7
AUSTIN	247,250	245,950	237,250	10,500	10,150	8,100	4.1	4.0	3.3
BEAUMONT-PORT ARTHUR-ORANGE	151,650	151,450	152,100	12,150	11,800	10,200	7.4	7.2	6.3
BROWNSVILLE-HARLINGEN-SAN BENITO	64,890	65,190	64,540	7,810	7,700	6,630	10.7	10.6	9.3
BRYAN-COLLEGE STATION	38,730	38,820	36,280	1,670	1,710	1,060	4.1	4.2	2.8
CORPUS CHRISTI	134,300	135,450	133,600	9,500	9,550	7,750	6.6	6.6	5.5
DALLAS-FORT WORTH	1,493,900	1,487,100	1,420,000	82,300	74,800	60,000	5.2	4.8	4.1
EL PASO	158,900	158,500	155,450	17,150	16,350	14,300	9.7	9.4	8.4
GALVESTON-TEXAS CITY	81,450	81,750	76,520	5,900	6,090	4,140	6.8	6.9	5.5
HOUSTON	1,429,800	1,419,000	1,376,500	68,200	68,000	51,200	4.6	4.6	3.6
KILLEEN-TEMPLE	61,480	61,390	60,790	4,320	4,040	3,430	6.6	6.2	5.3
LAREDO	31,900	32,330	29,210	4,090	3,810	3,460	11.4	10.5	10.6
LONGVIEW-MARSHALL	63,860	63,470	62,830	5,280	5,110	3,980	7.6	7.5	6.0
LUBBOCK	98,150	98,020	96,090	4,860	4,740	3,780	4.7	4.6	3.8
MCALLEN-PHARR-EDINBURG	73,570	73,860	72,730	14,000	12,060	11,060	16.0	14.0	13.2
MIDLAND	48,760	48,390	44,390	2,220	1,810	1,580	4.4	3.6	3.4
ODESSA	62,200	61,030	57,970	2,550	2,910	2,220	3.9	4.6	3.7
SAN ANGELO	42,800	42,600	41,120	1,740	1,890	1,420	3.9	4.2	3.3
SAN ANTONIO	398,450	396,950	384,500	30,350	29,900	26,400	7.1	7.0	6.4
SHERMAN-DENISON	38,800	38,340	36,810	2,860	2,710	1,970	6.9	6.6	4.8
TEXARKANA	44,790	44,830	46,230	4,810	4,950	3,710	9.7	9.9	7.4
TYLER	60,230	59,580	61,650	4,540	4,620	2,920	7.0	7.2	4.5
WACO	76,160	75,840	74,400	5,080	4,920	3,650	6.3	6.1	4.7
WICHITA FALLS	58,800	58,320	57,210	2,640	2,860	1,930	4.3	4.7	3.3

†Sum of estimated number of total employed and unemployed workers residing in the specified areas.

‡Includes resident wage and salary workers, self-employed, unpaid family workers and domestics in private households, agricultural workers and workers involved in labor management disputes.

*Preliminary—subject to revision. **Revised.

TEXAS LABOR MARKET REVIEW
Official Publication of
TEXAS EMPLOYMENT COMMISSION
NOLAN F. WARD ..... Chairman
KEN CLAPP ..... Commissioner
A.C. SHIRLEY ..... Commissioner
ERNIE W. TULLIS, Administrator

Published Monthly at the TEC Building, Austin, Texas
Economic Research and Analysis Department

The newspapers, periodicals, books and miscellaneous publishing portion of printing and publishing decreased employment as seasonal cutbacks occurred at firms involved in printing and publishing school yearbooks. This loss led to a moderate decline in the industry as the majority of firms in printing and publishing remained stable. Several firms in other nondurable goods reported employment losses due to layoffs. Small gains were posted in textile mill products, paper and allied products, and leather and leather products.

Employment in the durable goods sector actually posted a small upturn over the month due primarily to a considerable gain in nonelectrical machinery. The advance within the nonelectrical machinery segment was the result of a gradual rise in employment among firms within the industry. Although this was the largest advance within the durable goods sector, almost all of the other industries reported at least some gain in employment. Only transportation equipment and electric and electronic equipment posted decreases, both of rather substantial quantities. Declines in business activity led to employment losses in electric and electronic equipment and at least one layoff of a notable proportion.

Reductions in the motor vehicles and equipment segment and the other transportation equipment segment of transportation equipment dropped the industry's employment level significantly from July to August. The greatest impact was exhibited by the motor vehicles and equipment portion which underwent a partial shutdown for retooling. The aircraft and parts segment continued an upward trend of employment activity that indicated more business for the industry. Other segments showing improvement over the month were lumber and wood products; stone, clay and glass products; and primary metal industries. Increased orders and a higher level of production activity led to the advances in lumber and wood products and stone, clay and glass products. Primary metal products increased as workers returned to their jobs at one large firm following a shutdown for vacation. Some labor-management disputes were still in effect during August in the industry, but the employment managed to rise in spite of these disputes.

Total employment in the nonmanufacturing industries fell as losses were heaviest in the government sector. Other sectors also lost employment, however, as construction tumbled and services suffered a minor cutback. Many seasonal workers left to prepare to return to school, but contract completions and fewer construction starts caused more concern for the employment outlook in the construction industry. The August level of employment in construction was only 200 above the year-ago total. The construction industry in Texas has averaged a growth rate of nearly 10 percent a year since 1975, yet from August 1979 to August 1980 it rose only one half of one percent.

Services wavered over the month as segments of the industry moved in opposite directions. Considerable declines were posted in business and repair services and amusement, while noteworthy gains were recorded in personal services and educational services. Amusement and recreation services dropped with the release of temporary and part-time student workers. Educational services increased due to colleges, universities and professional schools hiring for the coming school term.

The most significant gain among the nonmanufacturing industries occurred in trade. Retail trade in particular was up as automotive dealers and service stations, apparel and accessory stores, and other retail trade managed to reverse their downward employment trends and post increases. Seasonal demand boosted by back-to-school sales led to the climb in apparel and accessory stores, where employment was nearly two percent over last month's. The gain in automotive dealers and service stations was especially pleasing since employment in that segment had previously declined by as much as 6,000 from year-ago estimates.

Finance, insurance and real estate rose over the month as over half of the gain was recorded in the real estate portion. Seasonal factors influenced the advance in real estate as summer is generally the busiest season for the industry. Parents of school-age children usually make a move, if they are planning to buy a home, between school terms. The summer weather is also more conducive to house searches. Transportation and public utilities scored a modest advance largely due to hiring in telephone communication. Violent weather generated by Hurricane Allen disrupted phone service in a large part of the State and led to the jump in new hires. Oil and gas extraction was responsible for most of a small gain which occurred in mining during the month.

ADVANCE NOTED IN HOURS AND EARNINGS

Average weekly hours (AWH) for a manufacturing production worker in Texas rose from 40.7 hours during July to 41.1 hours in August. Over the same period average hourly earnings (AHE) climbed by two cents from $7.21 an hour to $7.23 per hour. The increase in both hours and earnings pushed the average weekly earnings figure close to $300 with a total of $297.15 for August. The weekly earnings figure is 11.4 percent above the year-ago level of $266.74.

Overtime gains led to increased hours and earnings in several industries over the month. Chief among these industries were furniture and fixtures, electric and electronic equipment, and leather and leather products.

HOURS AND EARNINGS IN TEXAS*

SOURCE: TEXAS EMPLOYMENT COMMISSION IN COOPERATION WITH THE BUREAU OF LABOR STATISTICS, U.S. DEPARTMENT OF LABOR

	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVERAGE HOURLY EARNINGS		
	AUG † 1980	JULY 1980	AUG 1979	AUG † 1980	JULY 1980	AUG 1979	AUG † 1980	JULY 1980	AUG 1979
FOR TEXAS									
MANUFACTURING—TOTAL	$297.15	$293.45	$266.74	41.1	40.7	41.1	$7.23	$7.21	$6.49
DURABLE GOODS	298.16	290.70	267.07	41.7	40.6	41.6	7.15	7.16	6.42
LUMBER & WOOD PRODUCTS	224.80	221.45	212.99	40.0	39.9	41.6	5.62	5.55	5.12
FURNITURE & FIXTURES	202.70	177.94	186.59	41.2	37.7	41.1	4.92	4.72	4.54
STONE, CLAY & GLASS PRODS	293.33	292.52	268.62	43.2	43.4	44.4	6.79	6.74	6.05
PRIMARY METAL INDUSTRIES	360.77	354.71	335.37	40.4	39.5	41.2	8.93	8.98	8.14
FABRICATED METAL PRODUCTS	300.46	302.32	272.74	41.5	41.3	41.2	7.24	7.32	6.62
MACHINERY, EXCEPT ELEC	313.93	301.49	279.72	43.3	41.7	42.0	7.25	7.23	6.66
OIL FIELD MACHINERY	375.20	355.14	332.56	45.7	43.1	43.7	8.21	8.24	7.61
ELEC. & ELECTRONIC EQUIP	271.32	243.00	229.23	40.8	37.5	40.5	6.65	6.48	5.66
TRANSPORTATION EQUIPMENT	364.14	361.15	311.08	42.0	40.9	41.7	8.67	8.83	7.46
AIRCRAFT & PARTS	397.88	391.13	349.54	42.6	42.7	43.1	9.34	9.16	8.11
INSTR. & RELATED PRODUCTS	227.37	220.70	205.67	39.0	39.2	39.4	5.83	5.63	5.22
MISC. MFG. INDUSTRIES	197.74	197.51	181.03	38.1	38.5	38.6	5.19	5.13	4.69
NONDURABLE GOODS	295.40	297.02	266.49	40.3	40.8	40.5	7.33	7.28	6.58
FOOD & KINDRED PRODUCTS	270.86	272.21	245.23	41.8	42.6	42.5	6.48	6.39	5.77
MEAT PRODUCTS	287.67	285.58	248.11	43.0	43.6	43.0	6.69	6.55	5.77
MALT BEVERAGES	542.64	542.91	483.34	53.2	53.7	44.1	10.20	10.11	10.96
TEXTILE MILL PRODUCTS	211.74	215.98	197.13	41.6	42.6	41.5	5.09	5.07	4.75
APPRL. & OTHER TEXT. PROD	147.19	147.74	139.08	35.9	36.3	36.6	4.10	4.07	3.80
PAPER & ALLIED PRODUCTS	320.54	325.43	294.84	43.2	43.8	42.0	7.42	7.43	7.02
PRINTING & PUBLISHING	261.69	256.86	234.43	39.0	38.8	39.4	6.71	6.62	5.95
CHEMICALS & ALLIED PRODS.	451.44	450.47	417.64	41.8	42.1	42.4	10.80	10.70	9.85
PETROLEUM & COAL PRODUCTS	451.73	463.51	415.94	42.1	43.4	43.6	10.73	10.68	9.54
PETROLEUM REFINING	467.04	480.87	430.57	42.0	43.4	43.1	11.12	11.08	9.99
LEATHER & LEATHER PRODUCTS	155.17	145.70	147.46	37.3	36.7	38.4	4.16	3.97	3.84
OTHER NONDURABLE GOODS	266.70	267.55	222.34	42.4	42.2	38.6	6.29	6.34	5.76
NONMANUFACTURING									
MINING	388.62	389.30	336.38	46.1	46.4	43.8	8.43	8.39	7.68
OIL & GAS EXTRACTION	391.39	392.54	337.80	46.1	46.4	43.7	8.49	8.46	7.73
METAL & COAL & NONMET. MRNLS., EXC. FUEL	327.34	325.02	310.75	46.3	46.9	46.8	7.07	6.93	6.64
COMMUNICATIONS, EXCEPT U.S. POSTAL SERV.	339.55	339.30	328.13	43.2	43.5	41.8	7.86	7.80	7.85
ELEC., GAS & SAN. SVCS.	334.10	338.60	308.48	41.4	41.7	42.2	8.07	8.12	7.31
WHOLESALE & RETAIL TRADE	196.40	197.05	184.41	34.7	35.0	35.6	5.66	5.63	5.18
WHOLESALE TRADE	294.11	290.07	266.99	40.4	40.4	40.7	7.28	7.18	6.56
RETAIL TRADE	155.69	157.94	150.86	32.3	32.7	33.6	4.82	4.83	4.49
GENERAL MDSE. STORES	119.38	117.90	129.74	25.4	25.3	30.6	4.70	4.66	4.24
BANKING	185.82	181.88	169.55	38.0	37.5	38.1	4.89	4.85	4.45
FOR THE MAJOR MARKETS									
AMARILLO									
MANUFACTURING	259.35	276.21	258.95	39.0	40.5	39.9	6.65	6.82	6.49
DURABLE GOODS	256.13	255.06	279.19	38.4	39.3	41.3	6.67	6.49	6.76
NONDURABLE GOODS	261.62	292.99	239.32	39.4	41.5	38.6	6.64	7.06	6.20
AUSTIN									
MANUFACTURING	232.80	228.50	201.29	40.7	40.3	40.5	5.72	5.67	4.97
DURABLE GOODS	239.20	235.58	202.40	41.1	40.9	40.4	5.82	5.76	5.01
NONDURABLE GOODS	200.97	197.02	195.69	38.5	37.6	40.6	5.22	5.24	4.82
BEAUMONT									
MANUFACTURING	425.43	428.08	384.08	42.8	42.3	42.3	9.94	10.12	9.08
DURABLE GOODS	387.19	377.31	322.09	43.8	41.6	41.4	8.84	9.07	7.78
NONDURABLE GOODS	448.38	457.74	419.99	42.3	42.7	42.9	10.60	10.72	9.79
CORPUS CHRISTI									
MANUFACTURING	263.25	309.06	293.41	34.1	40.4	41.5	7.72	7.65	7.07
DURABLE GOODS	200.89	272.05	228.04	30.3	39.2	37.2	6.63	6.94	6.13
NONDURABLE GOODS	304.15	334.13	330.57	36.6	41.2	43.9	8.31	8.11	7.53
DALLAS/FT. WORTH									
MANUFACTURING	274.86	267.53	249.04	40.6	39.4	41.3	6.77	6.79	6.03
DURABLE GOODS	289.26	279.89	266.66	40.4	39.2	42.0	7.16	7.14	6.23
NONDURABLE GOODS	246.19	242.99	222.08	41.1	39.9	39.8	5.99	6.09	5.58
EL PASO									
MANUFACTURING	191.95	197.60	194.43	37.2	38.0	39.2	5.16	5.20	4.96
DURABLE GOODS	195.49	198.72	242.14	32.1	32.0	39.5	6.09	6.21	6.13
NONDURABLE GOODS	191.95	197.31	177.91	38.7	39.7	39.1	4.96	4.97	4.55
GALVESTON									
MANUFACTURING	513.24	461.78	408.94	45.1	43.4	41.9	11.38	10.64	9.76
DURABLE GOODS	441.30	434.21	340.90	46.6	47.3	40.2	9.47	9.18	8.48
NONDURABLE GOODS	540.55	472.50	435.80	44.6	42.0	42.6	12.12	11.25	10.23
HOUSTON									
MANUFACTURING	365.93	362.94	332.71	42.6	42.8	42.6	8.59	8.48	7.81
DURABLE GOODS	341.46	339.71	312.68	42.0	42.2	42.6	8.13	8.05	7.34
NONDURABLE GOODS	405.48	401.69	362.94	43.6	43.9	42.4	9.30	9.15	8.56
LUBBOCK									
MANUFACTURING	227.40	225.12	203.27	40.9	40.2	40.9	5.56	5.60	4.97
DURABLE GOODS	215.90	220.08	193.25	38.9	39.3	39.6	5.55	5.60	4.88
NONDURABLE GOODS	253.99	238.00	227.56	45.6	42.5	44.1	5.57	5.60	5.16
SAN ANTONIO									
MANUFACTURING	216.83	215.28	195.84	41.3	41.4	40.8	5.25	5.20	4.80
DURABLE GOODS	226.43	227.69	201.54	41.7	42.4	41.3	5.43	5.37	4.88
NONDURABLE GOODS	207.26	203.21	191.09	40.8	40.4	40.4	5.08	5.03	4.73
WACO									
MANUFACTURING	244.77	254.08	222.72	39.8	39.7	39.7	6.15	6.40	5.61
DURABLE GOODS	257.48	253.20	234.68	41.0	40.0	41.1	6.28	6.33	5.71
NONDURABLE GOODS	230.23	254.27	209.17	38.5	39.3	38.1	5.98	6.47	5.49
WICHITA FALLS									
MANUFACTURING	274.44	251.55	243.59	40.3	38.7	40.8	6.81	6.50	5.97
DURABLE GOODS	293.66	265.98	263.34	40.9	39.0	41.8	7.18	6.82	6.30
NONDURABLE GOODS	214.86	208.10	183.71	38.3	37.7	37.8	5.61	5.52	4.86

*Figures cover Production Workers in Manufacturing and Mining industries only and Nonsupervisory Employees in other industry divisions. Earnings averages include premium pay for overtime, holidays, and for late-shift work. †Preliminary—subject to revisions upon receipt of additional reports.

NONAGRICULTURAL WAGE AND SALARY†ESTIMATES—TEXAS

INDUSTRY	AUG.* 1980	JULY** 1980	AUG.** 1979	CHANGE FROM JULY 1980	CHANGE FROM AUG. 1979
‡TOTAL NONAGRICULTURAL EMPLOYMENT	5,783,700	5,797,800	5,627,100	−14,100	156,600
MANUFACTURING	1,044,200	1,044,500	1,028,600	− 300	15,600
DURABLE GOODS	609,900	608,100	604,400	1,800	5,500
LUMBER & WOOD PRODUCTS	36,200	34,900	37,800	1,300	− 1,600
LOGGING CAMPS, SAWMILLS, PLANING MILLS	7,500	7,400	8,800	100	− 1,300
FURNITURE & FIXTURES	18,000	17,700	19,100	300	− 1,100
STONE, CLAY & GLASS PRODUCTS	43,800	43,300	46,200	500	− 2,400
CONCRETE, GYPSUM & PLASTER PRODUCTS	18,900	18,800	19,000	100	− 100
PRIMARY METAL INDUSTRIES	44,000	43,300	47,000	700	− 3,000
FABRICATED METAL PRODUCTS	93,800	93,600	92,900	200	900
FABRICATED STRUCTURAL METAL PRODUCTS	49,600	49,200	48,500	400	1,100
MACHINERY, EXCEPT ELECTRICAL	158,400	155,900	150,700	2,500	7,700
OIL FIELD MACHINERY	64,300	64,000	59,600	300	4,700
ELECTRIC & ELECTRONIC EQUIPMENT	103,000	104,300	101,800	− 1,300	1,200
TRANSPORTATION EQUIPMENT	80,700	83,500	78,300	− 2,800	2,400
AIRCRAFT & PARTS	50,800	50,200	47,000	600	3,800
INSTRUMENTS & RELATED PRODUCTS	19,000	18,800	18,400	200	600
MISCELLANEOUS MANUFACTURING INDUSTRIES	13,000	12,800	12,200	200	800
NONDURABLE GOODS	434,300	436,400	424,200	− 2,100	10,100
FOOD & KINDRED PRODUCTS	97,600	98,100	97,500	− 500	100
MEAT PRODUCTS	25,900	26,000	26,000	− 100	− 100
DAIRY PRODUCTS	5,500	5,500	5,500	0	0
BAKERY PRODUCTS	11,600	11,900	10,900	− 300	700
MALT BEVERAGES	3,800	3,800	3,600	0	200
TEXTILE MILL PRODUCTS	6,100	6,000	5,900	100	200
APPAREL & OTHER FINISHED TEXTILE PRODUCTS	75,100	75,500	75,500	− 400	− 400
PAPER & ALLIED PRODUCTS	22,100	22,000	22,500	100	− 400
PRINTING & PUBLISHING	61,900	62,400	59,800	− 500	2,100
NEWSPAPER, PERIODICALS, BOOKS & MISC. PUBL.	32,900	33,400	31,300	− 500	1,600
CHEMICALS & ALLIED PRODUCTS	82,500	83,100	81,300	− 600	1,200
PETROLEUM & COAL PRODUCTS	51,600	51,600	43,300	0	8,300
PETROLEUM REFINING	47,900	47,800	39,400	100	8,500
LEATHER & LEATHER PRODUCTS	7,900	7,700	7,200	200	700
OTHER NONDURABLE GOODS	29,500	30,000	31,200	− 500	− 1,700
TOTAL NONMANUFACTURING	4,739,500	4,753,300	4,598,500	−13,800	141,000
MINING	227,300	226,900	203,300	400	24,000
OIL & GAS EXTRACTION	217,000	216,700	193,800	300	23,200
METAL & COAL & NONMET. MNRLS., EXC. FUEL	10,300	10,200	9,500	100	800
CONSTRUCTION	438,500	442,800	438,300	− 4,300	200
TRANSPORTATION & PUBLIC UTILITIES	366,100	365,400	360,200	700	5,900
RAILROAD TRANSPORTATION	31,600	31,600	32,100	0	− 500
TRANSPORTATION, EXCEPT RAILROADS	179,700	179,800	178,200	− 100	1,500
TRANSPORTATION BY AIR	35,900	35,900	35,000	0	900
COMMUNICATIONS, EXC. U.S. POSTAL SERVICE	82,200	81,500	82,000	700	200
ELECTRIC, GAS & SANITARY SERVICES	72,600	72,500	67,900	100	4,700
ELECTRIC SERVICES	39,300	39,100	35,800	200	3,500
GAS PRODUCTION & DISTRIBUTION	28,400	28,500	27,600	− 100	800
WHOLESALE & RETAIL TRADE	1,396,400	1,393,000	1,379,900	3,400	16,500
WHOLESALE TRADE	410,000	409,400	401,000	600	9,000
RETAIL TRADE	986,400	983,600	978,900	2,800	7,500
BUILDING MATERIALS & GARDEN SUPPLIES	44,700	45,000	45,900	− 300	− 1,200
GENERAL MERCHANDISE STORES	139,100	138,900	142,400	200	− 3,300
FOOD STORES	164,400	165,400	159,200	− 1,000	5,200
AUTOMOTIVE DEALERS & SERVICE STATIONS	122,600	121,900	127,300	700	− 4,700
APPAREL & ACCESSORY STORES	77,200	75,800	73,000	1,400	4,200
OTHER RETAIL TRADE	438,400	436,600	431,100	1,800	7,300
FINANCE, INSURANCE & REAL ESTATE	336,900	334,700	320,300	2,200	16,600
BANKING	88,800	88,300	83,500	500	5,300
INSURANCE CARRIERS, AGENTS & BROKERS	116,300	115,800	111,400	500	4,900
OTHER FINANCE, INSURANCE & REAL ESTATE	131,800	130,600	125,400	1,200	6,400
SERVICES	1,004,100	1,004,400	974,600	− 300	29,500
HOTELS & OTHER LODGING PLACES	57,700	57,200	57,700	500	0
PERSONAL SERVICES	62,700	61,500	63,200	1,200	− 500
BUSINESS & REPAIR SERVICES	256,800	258,100	250,400	− 1,300	6,400
AMUSEMENT, INCLUDING MOTION PICTURES	48,000	49,700	46,800	− 1,700	1,200
HEALTH SERVICES	272,100	271,300	261,100	800	11,000
EDUCATIONAL SERVICES	43,700	42,700	45,200	1,000	− 1,500
OTHER SERVICES & MISCELLANEOUS	263,100	263,900	250,200	− 800	12,900
TOTAL GOVERNMENT	970,200	986,100	921,900	−15,900	48,300
TOTAL FEDERAL GOVERNMENT	162,400	167,300	164,100	− 4,900	− 1,700
TOTAL STATE GOVERNMENT	187,700	191,000	188,100	− 3,300	− 400
TOTAL LOCAL GOVERNMENT	620,100	627,800	569,700	− 7,700	50,400
TOTAL MANUFACTURING PRODUCTION WORKERS	716,700	715,300	714,600	1,400	2,100
DURABLE GOODS	409,400	407,200	412,300	2,200	− 2,900
NONDURABLE GOODS	307,300	308,100	302,300	− 800	5,000

†Estimated number of nonagricultural jobs in Texas without reference to place of residence of workers. ‡Estimates of TEC in cooperation with Bureau of Labor Statistics and Employment and Training Administration, U.S. Department of Labor. *Preliminary—subject to revision. **Revised.

Overtime pay also contributed to gains in AHE in other industries. Two of these were aircraft and parts and instruments and related products where general wage rate increases combined with overtime pay at a few firms led to a large gain in AHE.

A seasonal reduction at firms which print and publish school yearbooks caused decreased hiring of entry level production workers. With fewer employees drawing entry level wages, the AHE for the industry advanced moderately. At the other extreme, the addition of many entry level workers in transportation equipment dropped the AHE. Also within the industry, an annual retooling process temporarily shut down one large firm, contributing to the decline in earnings. Additional hiring of lower-paid workers led to lower AHE, while an increase in business activity led to higher AWH in oil field machinery.

FARM EMPLOYMENT RECORDS DECLINE

Total employment in agriculture posted a decrease from the mid-July level of 205,200 to a mid-August figure of 190,650. The number of seasonal farmworkers was 62,650 at mid-August, well below the August 1979 level of 71,900. Accordingly the numbers of seasonal workers by crop activity were also all below last year's totals.

Agricultural activity over the month was affected greatly by Hurricane Allen. This was chiefly true in the Lower Rio Grande Valley where much of the vegetable crop will have to be replanted. Damage to the citrus crop was also reported in the region. In contrast to damage caused by the hurricane and its heavy rains, much of the State's cotton crop had already been damaged by the drought.